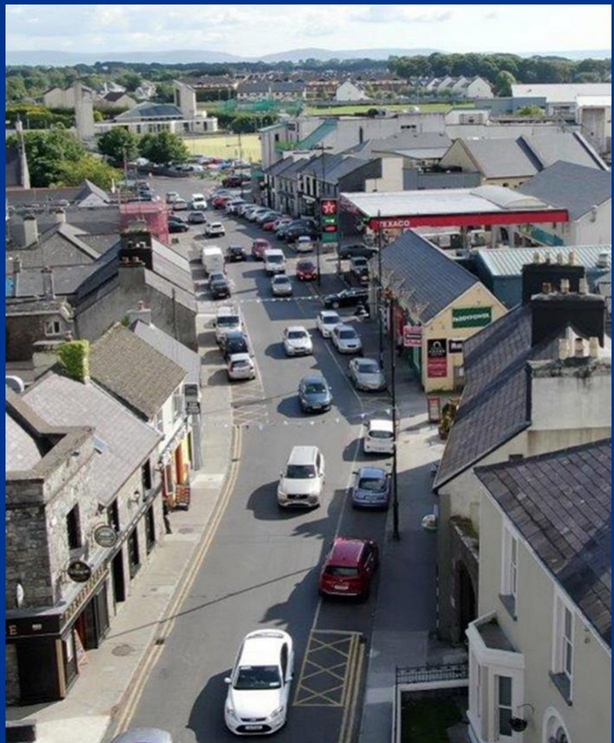
Galway Metropolitan Area Joint Retail Strategy

On Behalf of Galway City Council and

Galway County Council

January 2026



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VISION AND ACTIONS STATEMENT

Galway City and County Metropolitan Area (GCCMA) is a region of distinctive vibrancy, where retailing is not only a function of commerce but a dynamic force that brings to life the city centre, metropolitan settlements and communities throughout the county. Retail is interwoven with Galway's unique historic and cultural fabric, blending traditional independent businesses, a celebrated food scene, world renowned festivals, outdoor markets and a welcoming, lively streetscape. The city`s commercial core and metropolitan settlements are centres not just of trade, but of social and cultural exchange, and their continued resilience is vital for residents, visitors, and the wider regional economy.

This Joint Retail Strategy (JRS) has been developed by Galway City Council and Galway County Council to provide a strategic policy framework to protect, promote and enhance the retail economy in the GCCMA. It will ensure that retail development both preserves and amplifies the distinct character of Galway, responding to the challenges and opportunities that come with economic growth, consumer behaviour, and the need for sustainable development.

STRATEGIC VISION

The vision for GCCMA`s retail environment is centred on promoting the City and Metropolitan Area Strategic Plan (MASP) area as a destination where unique retail offerings coexist with vibrant cultural amenities and high-quality public spaces. The strategy seeks to protect and enrich core shopping areas and strengthen links between retail and Galway's distinctive identity. It is crucial that retail expansion proceeds in tandem with public realm improvements, investment in the built environment, the integration with sustainable transport and embrace of green infrastructure, so as to enhance the experience for people who work, live, and visit the GGCMA. Both councils are committed to delivering a healthy and competitive retail environment focused on the Key Pillars of:

- Supporting Enterprise and Investment;
- Circular Economy, Climate and Sustainability;
- Routes To Market;
- Sustainable Communities and Land Use;
- Public Realm and Placemaking and;
- Accessibility and Inclusiveness.

These pillars are outlined in further detail below.

This JRS represents a forward-looking, place-based approach designed to preserve and strengthen Galway's unique position as a city and region of culture, creativity, and commerce. The JRS ensures that the symbiotic relationship between the city and MASP settlements is protected and enhanced, providing opportunities for economic growth in Oranmore, Baile Chláir and Bearna.

By integrating retail, transport, culture, public space, and sustainability into a strategic policy framework, Galway's communities will prosper, the visitor experience will deepen, and the singular charm that sets Galway apart on the national and international stage will endure and flourish.

KEY RETAIL PILLARS

SUPPORTING ENTERPRISE AND INVESTMENT

A defining feature of Galway's uniqueness is its continued tradition of supporting independent retailers, creative producers and outdoor markets, while balancing the need to facilitate larger convenience, comparison and warehouse retailers. The strategy will also facilitate an enhanced provision of efficient, reliable retail channels and marketplaces for local food, design, craft and produce, strengthening Galway's reputation as a centre of innovation and creativity.

Planned redevelopment of market spaces, both indoor and outdoor, is intended to enhance retail diversity while also serving as major amenities and visitor attractions, providing focal points for the local and regional economy. Improvements to the public realm will provide opportunities for outdoor dining and events enhancing the retail diversity, contributing to the vitality and vibrancy of the city without diminishing movement, accessibility or the welcoming nature of Galway's streets.

Galway's arts and cultural attractions, festivals and activities play a pivotal role in attracting year-round footfall, creating vibrancy & vitality and bolstering retailing, and the local economy. The City and County Councils will continue to foster a diverse range of daytime, evening and late-night cultural activities, where citizens and visitors alike feel safe and welcome, encouraging people to stay longer and enjoy the experience.

Promoting increased footfall in the city and county metropolitan area settlements through active travel measures will support the growth of enterprise and invite further retail investment.

CIRCULAR ECONOMY, CLIMATE AND SUSTAINABILITY

Responding to climate change is a core pillar of Galway's retail and development strategy. Reducing the carbon footprint of the city and county metropolitan area will be embedded into all new retail and mixed-use developments through compact urban form, support for active and sustainable travel, protection and expansion of green networks, and promotion of renewable energy technologies. These measures will enhance the appeal and sense of place that differentiates Galway in a competitive national and international context.

The JRS supports the principles of sustainable consumerism and the circular economy, encouraging practices such as repairing, refurbishing, reusing and recycling, to reduce waste and environmental impact. The JRS encourages retailers to adopt circular economy principles, incorporating design products to be durable, repairable, and recyclable, and help in minimising resource use and pollution.

ROUTES TO MARKET

Delivery of this strategy will rely on sustained partnership between Galway City and County Councils, with continued commitment to active monitoring and review of trends and outcomes. Galway City and County Council will work together to ensure that the unique qualities and needs of Galway are reflected in policy adaptation, targeted investment, and ongoing collaboration with stakeholders at all levels.

Major regeneration and public realm initiatives, such as the Living Cities Initiative and THRIVE, will be leveraged to maximise the impact of strategy implementation.

SUSTAINABLE COMMUNITIES AND LAND USE

The primacy of retail at ground level on key streets within the city and metropolitan settlements will remain strictly protected, preserving the animated, walkable streetscapes that are a hallmark of Galway's attractiveness.

Retail development is to be pursued alongside complementary activity, particularly cultural, tourist, entertainment and local markets, which add interest and diversity to the street, promote integration between shopping and leisure and encourage longer visits to both the city centre and MASP settlements. The character of distinct quarters within the city e.g. Latin Quarter, The West and Salthill will be safeguarded and leveraged as a competitive advantage for the region's retail economy, creating a unique mix of day-time shopping and night-time culture.

It is imperative that the city and metropolitan towns become destinations for people to live, work and visit which will help increase footfall, and ensure that the vibrancy and vitality of their centres are retained and enhanced. The JRS will encourage, support and promote more residential units as part of mixed-use developments or through the reuse/ retrofit of upper floors of existing buildings including through targeted schemes such as the Living City Initiative.

The Galway Transport Strategy (GTS) and the future Galway Metropolitan Area Transport Strategy (GMATS) will be fully supported in its ambition to reduce car dependency and enhanced public and active travel options, and improve links between retail centres, neighbourhoods and residential areas. Projects such as Cross City Link, Bus Connects, Droichead an Dóchais and Wolfe Tone pedestrian / cycle bridges will combine to enhance active travel throughout the region.

Provision of local shops, markets, and services at all levels—including at the lowest neighbourhood tier—is a core tenet of this Strategy, aligned with the 15-minute city concept. This approach ensures that ordinary daily needs may be met within a short walk, cycle, or public transport journey, strengthening social cohesion, reducing travel demand, and supporting a sustainable pattern of settlement. Enhancements in permeability and the creation of legible, attractive pedestrian routes across Galway's city centre, city neighbourhoods and metropolitan settlements remain a constant priority. Promoting the 10-minute town initiative in the MASP settlements and ensuring new developments are of an appropriate density in multi-unit developments will improve the vibrancy of these settlements

PUBLIC REALM AND PLACEMAKING

The city core, city neighbourhoods and county metropolitan area settlements will be the focus for enhancement of public realm and placemaking, emphasising the value of historic streets and dynamic neighbourhoods. These principles are intrinsically linked to success in retail and creating a particular sense of place for Galway.

This strategy emphasises the importance of delivering new and revitalised retail spaces that integrate shopping, dining, culture, and leisure, all of which are essential for creating a high-quality retail experience in the city and the MASP Settlements.

The JRS underlines the importance of Galway's architectural, cultural, and urban heritage while enabling adaptable and modern retail formats at appropriate locations. Public realm transformation as outlined in the Galway Public Realm Strategy (2019) will continue as a priority, seeking to deliver accessible, pedestrian friendly streets, animated civic spaces, and environments that offer places to linger and socialise. Inclusive and universal design principles are to be embedded in all public space and retail projects, ensuring equal access for all and tangible improvement in the quality of life for residents and visitors alike.

The GCCMA environment will be enriched through focused investment in green infrastructure, expanding the urban tree canopy, and introducing sustainable drainage systems into city and town streetscapes, thus supporting climate resilience while enhancing the visitor and retail experience.

The visual richness and welcoming character of Galway's urban realm is to be protected and advanced, with new developments required to contribute positively to the unique spatial, cultural, and social attributes that distinguish Galway from other Irish cities.

ACCESSIBILITY AND INCLUSIVENESS

This JRS will ensure that the retail environment of Galway City and MASP is welcoming, accessible, and inclusive for all residents and visitors by removing physical, social, and economic barriers to participation. This will be achieved by promoting universal design across retail spaces, incorporating inclusive design principles in public realm and retail spaces, improving transport and digital connectivity to shops and services, and encouraging equitable opportunities for businesses and consumers.

ACTIONS

SUPPORTING ENTERPRISE AND INVESTMENT

1. Protect and promote Galway City as a primary centre for growth in the West Region and to sustain its competitiveness and importance as a Level 1 Metropolitan Centre.
2. Preserve and enhance the competitiveness of retail in Galway City and the County Metropolitan Area settlements, by facilitating the development of additional retail floorspace where it can be clearly established that such development will improve the retail offering.
3. Promote and encourage retail growth and investment in the metropolitan settlements while respecting the symbiotic relationship with the city.
4. Facilitate an enhanced provision of efficient, reliable retail channels and marketplaces for local food, design, craft and produce, strengthening Galway's reputation as a centre of innovation and creativity.
5. Encourage more local spending by enhancing the range and quality of retail options within the City and MASP settlements.
6. Encourage the conservation led adaptation and reuse of existing vacant buildings for retail-led mixed use development respecting the historic fabric and urban grain of the existing building(s) where appropriate.
7. Recognise the value of smaller floor plates that ensure suitable premises for smaller retail operators and encourage a diversity in the retail offering.
8. Investigate the establishment of a Galway Chamber of Commerce / retailer led Business Improvement District (BID) Scheme for the City Centre.
9. Support the launch of a Shop Local Campaign & Loyalty Scheme for local retailers and locally produced produce in Galway City.
10. Support the recommendations of the Galway City Night Time Economy Action Plan 2024-2025 (and subsequent revisions thereafter)
11. Support the extension of City Centre retail opening hours.
12. Support the establishment of a retailer led working group, for city centre retail & hospitality sectors, with a view to bringing key stakeholders together.
13. Implement, monitor and report progress as part of the annual reporting mechanism for each local authority.

CIRCULAR ECONOMY, CLIMATE AND SUSTAINABILITY

1. Support sustainable retail development including the promotion of sustainable retail concepts and practices
2. Galway City Council and Galway County Council will work with their respective Climate Action Sections to support the retail sector
3. Develop information campaigns, staff training, and consumer incentives that promote sustainable behaviours where appropriate
4. Promote circular economy principles incorporating design products to be durable, repairable, and recyclable and help in minimising resource use and pollution.

ROUTES TO MARKET

1. Galway City and County Councils will maintain a continued commitment to review the trends and outcomes of the JRS, and promote the symbiotic relationship between the city and MASP area to make the entire region a more attractive route for investment in the retail market
2. Promote regeneration and public realm initiatives such as the Living Cities Initiative and the Town Centre Heritage Revival Scheme (THRIVE)
3. Support local food production, art and design and encourage the provision of markets and events for local producers to sell their products
4. Support the creation of a Galway Retail Incubator Programme to develop a structured approach supporting new products and produce throughout their stages of development
5. Promote or incentivise vacant or underutilised locations, to facilitate start-ups to test retail concepts/products before moving to a more permanent location
6. Galway City Council will work with the Economic Development Unit, to develop a Galway retail export accelerator and launch a scheme for Galway retailers to build knowledge and access to international markets by focusing on Galway's cultural brand, existing twinning arrangements and state supports for export readiness.
7. Work with existing markets to enhance governance and capacity to strengthen capabilities in advocacy and long-term strategic planning.
8. Working with market trader groups such as Tiny Traders, St. Nicholas Market and seasonal market groups, to expand pop-up retail and market events across city and metropolitan settlements, linking local producers, craftspeople, and retailers with high-footfall locations and tourism events.
9. Develop Galway Retailers' Tourism Partnership - Integrate retail into Galway's distinct urban quarters / tourism corridors (e.g., Latin Quarter, The West and Salthill) through retail trails, collaborative campaigns, and cross-promotion bundles with attractions and festivals.
10. Establish city and metropolitan settlements showcase venues in prominent locations where local artists, craftspeople and niche producers can promote products to new audiences, including trade buyers.
11. Promote Galway branded "Proudly Local" Programmes. Roll out MASP wide "Galway Made" branding scheme for retail products and experiences, embedding local identity into in-store, online, and tourism platforms to differentiate against mainstream / international competitors

SUSTAINABLE COMMUNITIES AND LAND USE

1. Promote Galway City and MASP settlements as compact, attractive and walkable urban neighbourhoods that deliver on the principle of the 15-minute city concept and the 10-minute town concept.
2. Ensure that Development Plan policy incorporates specific land use and public realm policies for Principal Shopping Streets and Mixed-Use Character Streets within Galway City and MASP settlements, where appropriate, ensuring appropriate mix of active ground-floor uses, support of independent retail, and high-quality streetscape design, promoting a sense of place and also including for ongoing monitoring of performance of these specific areas
3. Encourage and support enhanced connectivity in the city and retail centres including improved public transport, pedestrian and cycle linkages.
4. Ensure, wherever feasible, that new retail development is integrated with existing and planned public transport networks, while promoting pedestrian and cycling access to reduce reliance on private car travel.
5. Support smaller and independent retailers in Galway City to ensure these businesses are at the core of city centre revitalisation and policy priorities, including through the Local Enterprise Office (LEO), which offers measures such as financial support, skills and training.
6. Support the delivery of larger comparison retail developments at appropriate locations in the city core, including Ceannt Quarter and Headford Road.
7. Support the delivery of convenience retail within District Centres and Neighbourhood Centres in the city and within the metropolitan settlements where appropriate
8. Continue to promote high density compact growth, where residential development is integrated with ground floor retail in urban areas and along main streets.
9. Support the vitality and viability of all retail centres and principal shopping streets through the targeted protection of ground floor retail uses and support for retail diversity and in particular independent retailers.
10. Manage effectively the balance between future food and beverage (F&B) uses with existing and established retail development to avoid an unsustainable loss of retail floorspace, particularly along Principal Shopping Streets
11. Progress the Headford Road LAP, with a view to maintaining and enhancing the quantity of existing retail provision and providing for new higher density mixed use neighbourhood.
12. Galway City and County Council will encourage active land management, by tackling vacancy & dereliction in the city and MASP settlements as appropriate in coordination with their Vacancy and Dereliction Teams.
13. Establish targeted incentives aimed at reducing commercial vacancy, including supporting adaptation / re-use.

PUBLIC REALM AND PLACEMAKING

1. Facilitate the redevelopment of Key Opportunity Sites as identified in Chapter 8.
2. Encourage and support investment and improvement in the public realm in all retail centres, where appropriate, which could include improved street lighting, hard and soft landscaping, seating, public art and wayfinding.
3. Promote and facilitate public realm and streetscape improvements on proposed Cross City Link streets, with particular emphasis on Eglinton Street, to create a vibrant, accessible and pedestrian-friendly urban environment.
4. Continue to roll out GTS (and any successor) projects to provide accessible, pedestrian-friendly routes and safe cycling links between retail districts, integrating public realm upgrades with green transport corridors (such as Salmon Weir Bridge, Wolfe Tone Bridge and Connector streets like Cross St. or Lombard St.)
5. Develop a Shopfront Improvement Scheme to improve the design, legibility, and materiality of shop fronts through the provision of grant funding, where available, to encourage property owners to enhance the visual amenity of the properties. Consideration should also be given to the installation of flood defence mechanisms / flood gates as part of shop front upgrades where applicable / appropriate.
6. Introduce more trees and urban planting in retail centres to increase biodiversity, improve air quality, and create pleasant micro-climates
7. Continue to work with Galway City Council and Galway County Council Vacant and Derelict Properties sections, as part of a targeted programme to refurbish and activate derelict or vacant properties in retail areas.

ACCESSIBILITY AND INCLUSIVENESS

1. Incorporate Universal Access Principles in public realm and retail spaces to ensure accessibility for people of all ages and abilities.
2. Continue to work with and engage with Access for All and other similar groups, to adopt and promote the United Nations Convention on the Rights of People with Disabilities (UNCRPD) and work towards developing Galway City as a disability friendly city.
3. Encourage bilingual retail signage and digital communications to serve Galway's diverse population and visitors, reflecting Galway's Irish language and cultural heritage. Promote the use of the Irish language and bilingual (Irish and English) signage on retail premises / shopfronts and in the public realm.
4. Support the delivery of sustainable transport and active travel measures as set out in the Galway Transport Strategy.
5. Work with transport providers to enhance bus services frequency, routes, and infrastructure serving City Centre, District and metropolitan settlements, ensuring affordable, reliable connections that reduce car dependency.
6. Support the development of a coordinated deliveries strategy to control HGV traffic on city centre and metropolitan settlement streets.
7. Expand the network of Mobility Hubs with Multi-Modal Access.

Introduction

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Preparation of the Joint Retail Strategy

Galway City and County Councils are proud to jointly present the ***Galway Metropolitan Area Joint Retail Strategy (JRS)***, a progressive and collaborative strategy aimed at guiding the sustainable development of retail throughout the Galway Region. The retail sector is currently experiencing profound change, particularly in relation to consumer behaviour, economic trends and environmental challenges. The need therefore to provide a Retail Strategy that will create a healthy and vibrant retail landscape together with providing a platform to guide future retail development is of fundamental importance and presents an exciting opportunity for the Metropolitan Area. This Strategy sets out a clear and ambitious vision to promote a dynamic, resilient, sustainable and inclusive retail environment that serves the needs of our communities while supporting local enterprise and investment. The recommendations of the Strategy have been informed by extensive baseline analysis including socio-economic and population profiling, retailing trends, policy alignment, consumer and stakeholder engagement, retail floorspace modelling and case study interrogation. The steps undertaken throughout the preparation of the JRS are visualised in process overview diagram as shown in ***Figure 1*** below.

Background

In the 1990s and early 2000s, Galway experienced significant retail growth, driven by the city's increasing population and economic expansion. This period saw the development of major shopping centres such as Eyre Square Centre and Galway Shopping Centre, and the expansion of retail parks, including Galway Retail Park located at Headford Road. While this development has provided convenience and variety for consumers, it has also contributed to an extension of economic activity away from Galway's historic city centre.

During that time, in 2002, the previous retail strategy for Galway City and County was developed. In the two decades since, significant changes and developments have taken place. The global financial crisis of 2008 had a notable impact on Galway's retail sector. Many retailers faced challenges due to reduced consumer spending and economic uncertainty. However, Galway's strong tourism industry and cultural appeal helped mitigate some of the adverse effects. The city saw a gradual recovery post-2013, with renewed investment in retail infrastructure and the entry of new retail brands.

Whilst there are a number of challenges that face the retail sector today, there are significant opportunities arising from the continued growth of the area that will contribute to delivering a sustainable retail future for Galway. This Strategy will play a key role in guiding retail development in the City and Metropolitan Area and will actively contribute to enhancing the vitality and vibrancy of Galway's urban areas promoting sustainable retail development and supporting the circular economy.

Strategic Approach

One of the central aims of the Strategy is to create a sustainable retail environment that aligns with national and regional planning objectives, while also addressing the unique characteristics and needs of Galway. By prioritising compact, mixed-use development and encouraging active travel, the Strategy supports both environmental best practice whilst also aiming to enhance the vitality and vibrancy of our towns and the city centre. The Strategy champions the integration of retail into vibrant urban spaces including identifying specific opportunity sites for redevelopment, ensuring that retail growth contributes positively to the liveability and economic well-being of the entire metropolitan area.

A key focus is placed on promoting localised retailing and providing a dedicated route to market for smaller and independent retailers. This Strategy recognises the immense value of Galway's indigenous retail sector and seeks to create conditions where local businesses can thrive. Through targeted supports, improved accessibility, and coordinated planning, the Strategy aims to strengthen the connection between local producers and consumers, reinforcing Galway's identity as a hub of creativity, quality, and local enterprise.

Reducing commercial vacancy and revitalising underused retail spaces is another core objective of the Strategy. By encouraging the adaptive reuse of vacant buildings through both policy intervention, the Strategy provides the Framework for reinvigorating retail areas and fostering diverse, attractive environments for business and community life. This approach not only addresses physical and economic challenges but also builds momentum for growth and provides certainty for future investment in the area.

The Galway Metropolitan Area Joint Retail Strategy stands as an exemplar of how strategic planning can drive sustainable retail development. It represents a shared vision between Galway City and County Councils to ensure that retail continues to play a central role in the social and economic fabric of the region. Through this Strategy, we are laying the foundation for a vibrant, inclusive, and future-ready retail sector that reflects the best of what Galway has to offer.

Alignment with national and regional, city & county strategic planning

This strategy has been prepared in line with the provisions set out in National and Regional Policy including the Regional Spatial and Economic Strategy (RSES) for the Northern and Western Region, which provides a strategic framework for the development of the Galway Metropolitan Area through its Metropolitan Area Strategic Plan (MASP), and the 'Retail Planning Guidelines for Planning Authorities' published by the Department of the Environment, Heritage and Local Government (DoEHLG) in 2012.

Both Galway City Development Plan (Policy 6.11) and Galway County Council Development Plan (Policy RET 3) include specific policy to prepare a Joint Retail Strategy for the Galway City and County Metropolitan Area. The strategy, when completed, will be assessed against policies in both plans, and any changes required can be incorporated into the respective development plans.

Spatial extent of the Joint Retail Strategy

According to the Regional Spatial and Economic Strategy 2020-2032 for the Northern and Western Regional Assembly, of which Galway City and County are part, the Joint Retail Strategy is to encompass the spatial extent of the Galway Metropolitan Area. Therefore, the focus of the analysis and the recommendations will be on the Metropolitan Area.

As Metropolitan Area and CSO statistical geographies do not fully align, parts of the analysis (particularly the socio-demographic & economic retail drivers) rely on data that includes areas outside the Metropolitan Area. These are rural areas in Co. Galway to the north of Baile Chláir and to the south-east of Oranmore (including Clarinbridge).

Within the Metropolitan Area, the analysis and recommendations in the Joint Retail Strategy focus on the main retail areas. These areas include

- Galway City Centre, consisting of the historic city centre and Headford Road,
- the three district centres in Galway City: Knocknacarra, Westside, Doughiska,
- and the three county metropolitan towns of Oranmore, Bearna, and Baile Chláir.

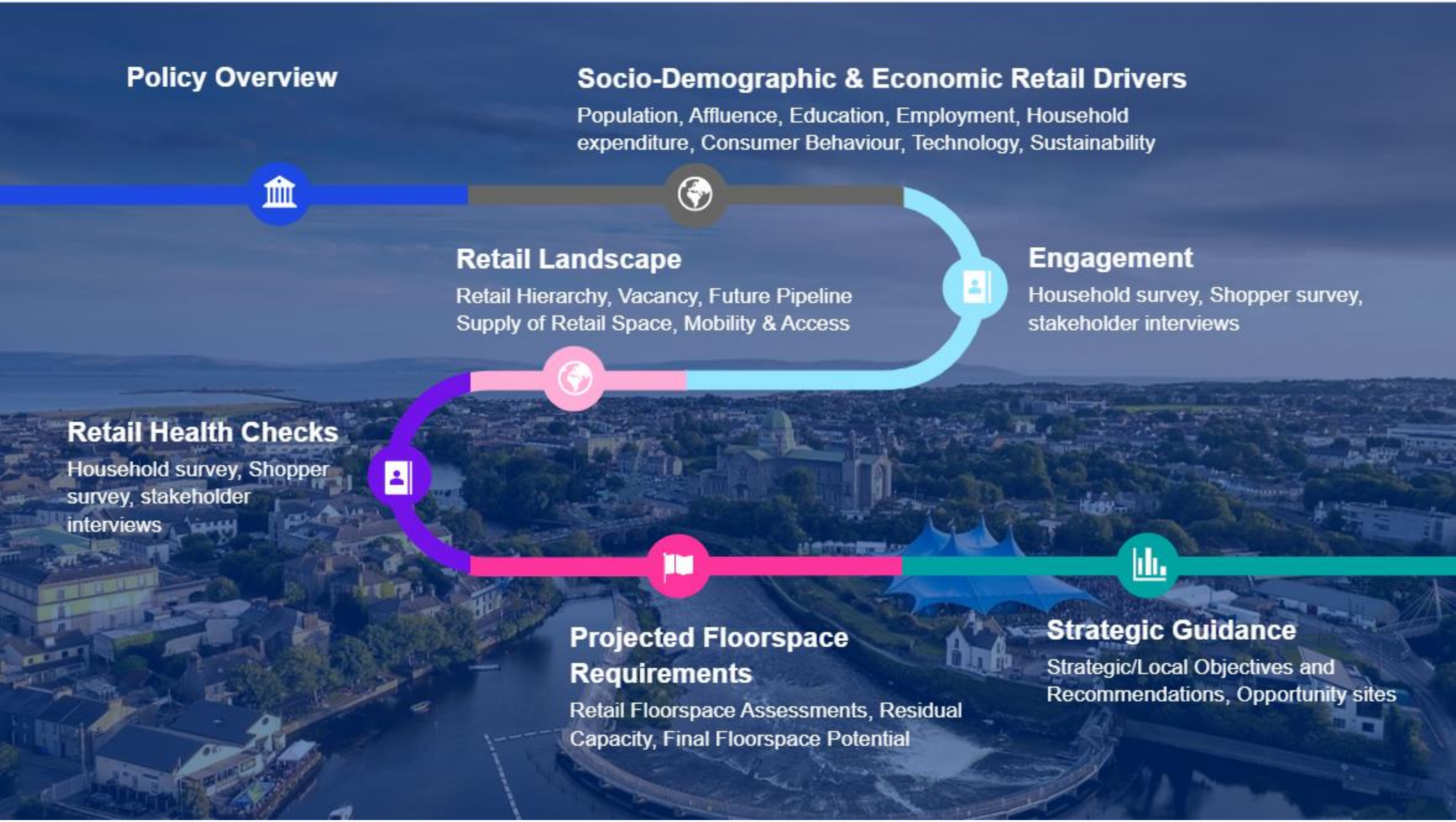


Figure 1 Process overview diagram: Galway Metropolitan Area Joint Retail Strategy (JRS) (Source: KPMG Future Analytics)

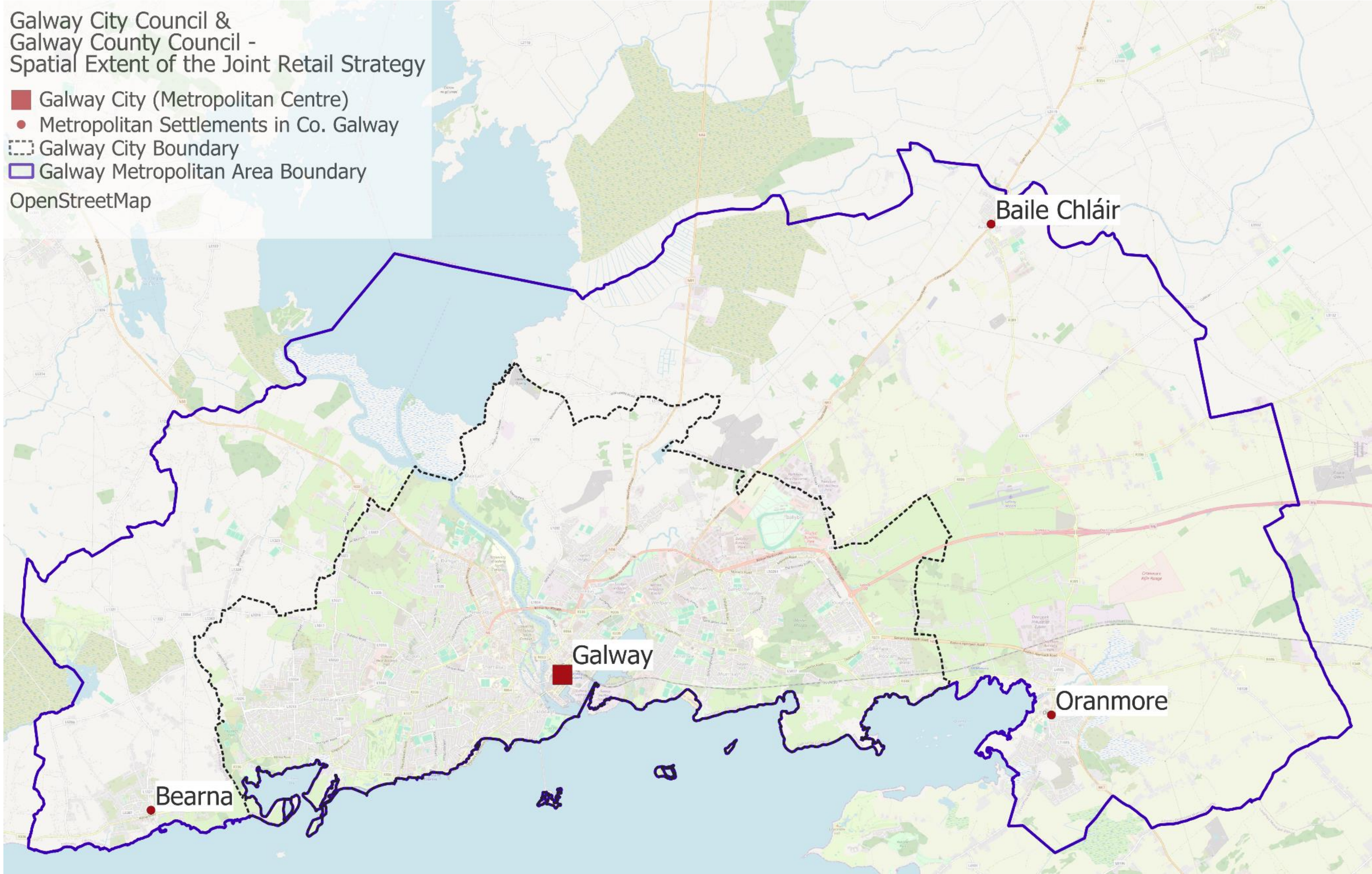


Figure 2 Geographical extent of the Joint Retail Strategy: Metropolitan Area
(Source: KPMG Future Analytics)

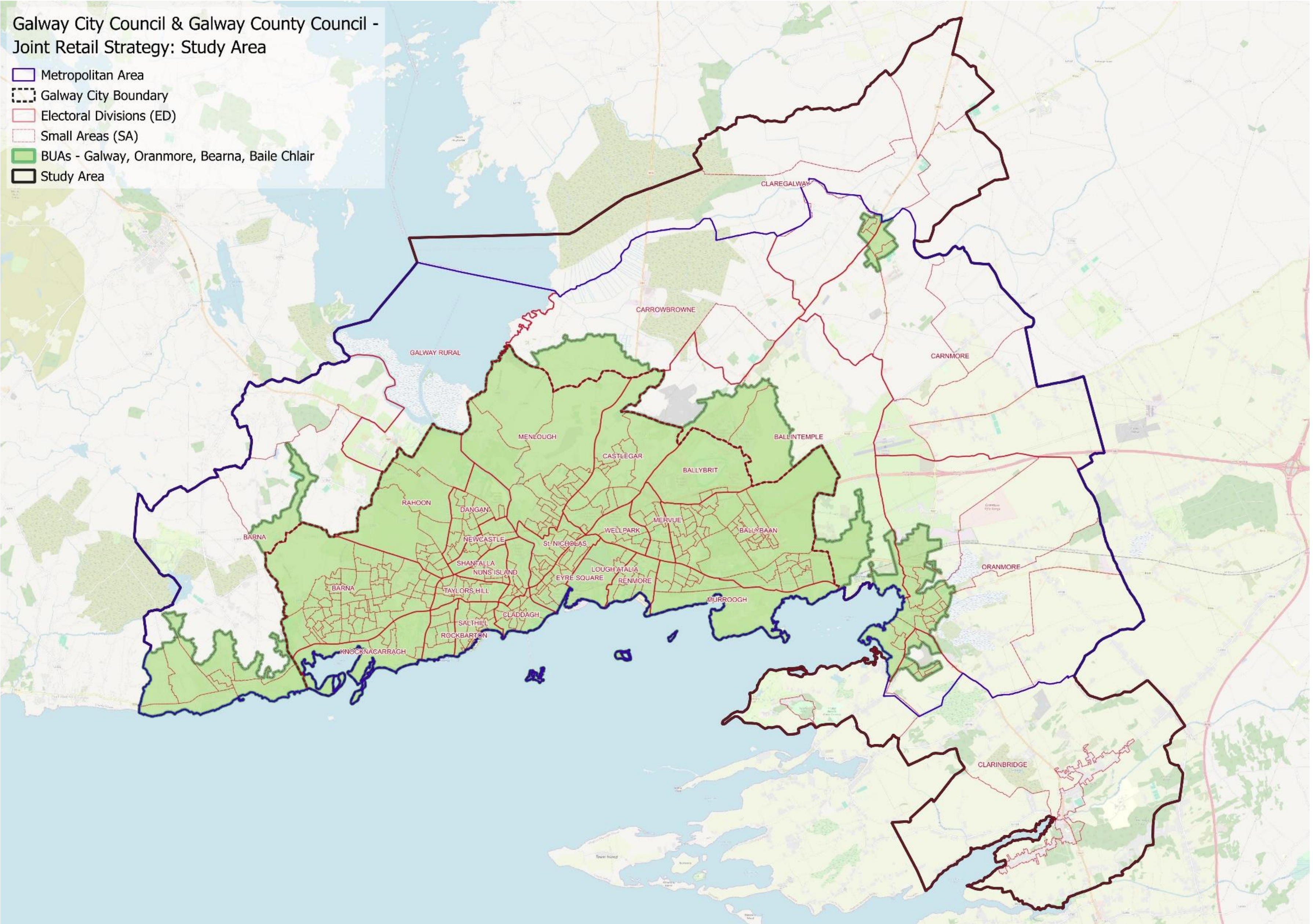
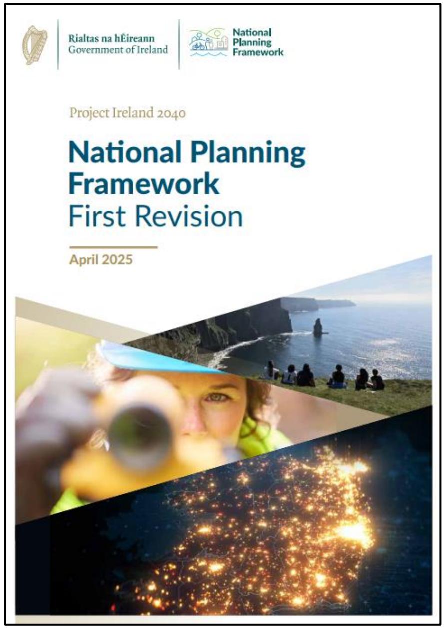


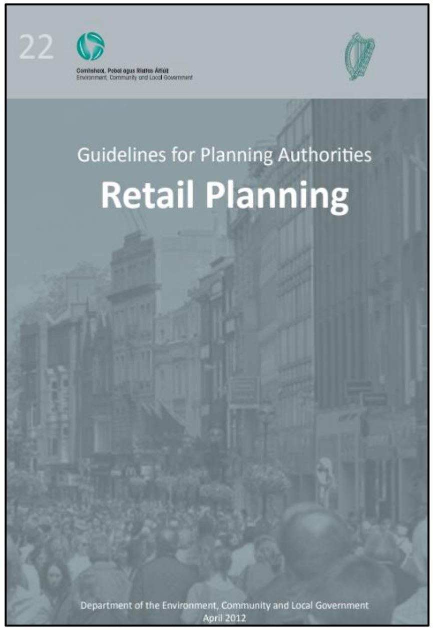
Figure 3 Geographical extent of the Study area of the Joint Retail Strategy: Statistical levels (Source: KPMG Future Analytics)

1. Policy Overview

1. Policy Overview

A Policy Review assessing relevant retail and planning policy objectives in the context of this strategy and the locational context of Galway has been undertaken. The review seeks to encapsulate the balanced and comprehensive methodologies adopted in the relevant strategies and plans that influence and shape retail development in the Galway Metropolitan Area, while also considering external factors and other economic sectors.





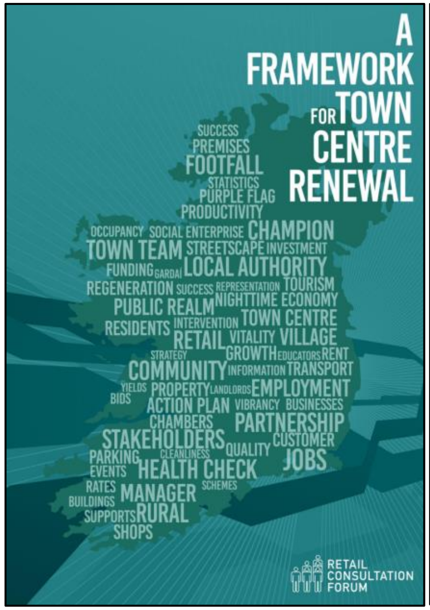
The National Planning Framework First Revision (April 2025) (NPF) includes a growth target of an additional 150,000 people in the NWRA Region between 2022-2040. Within the framework, Galway City and Suburbs are assigned a population growth target of 36,000 bringing the total population of Galway City and Suburbs to at least 122,000 by 2040. The Revised NPF maintains the growth targets of the NPF published in 2018 regarding housing development, with 50% of new city housing to be located within the existing Galway City and suburbs footprint. To cater to the needs of the growing population, the Framework puts a strong emphasis on capitalising on the potential of underutilised and publicly owned centrally located sites to boost the population and economic outputs of central areas as drivers for the wider region.

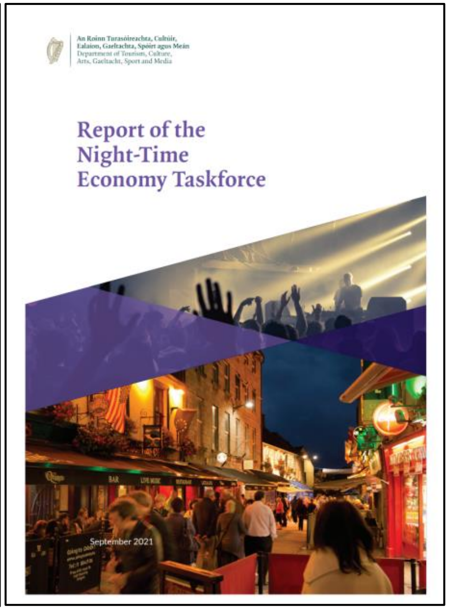
This growth will be realised through developing and implementing comprehensive and strategic metropolitan area spatial plans for Galway that secure long term transformational and rejuvenation focused city development. The Joint Retail Strategy for the Galway Metropolitan Area will reflect the policy objectives, facilitating the sustainable and long-term growth of Galway Metropolitan Area.

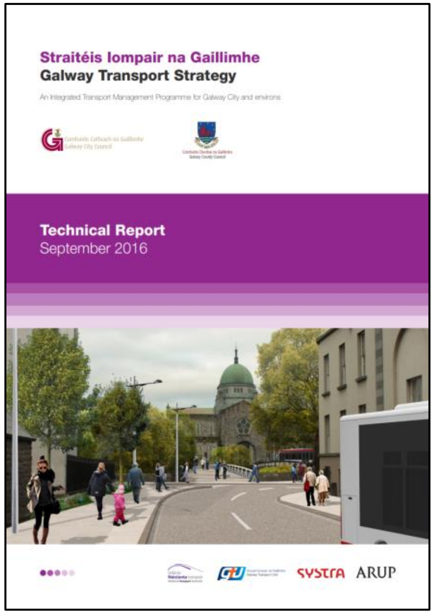
The National Development Plan 2021-2030 sets out an overarching strategy for aiming towards guiding the strategic investments and public infrastructure developments in Ireland. The National Development Plan Review 2025 prioritises greater investment in services and infrastructure to support economic growth and enhance housing supply. It also seeks to enhance Ireland's competitiveness through innovation, and addressing labour and productivity challenges and commits to supporting compact growth and balanced regional development.

The Retail Planning Guidelines and the accompanying Retail Design Manual published in 2012, provide a framework for Planning Authorities in the preparation of Retail Strategies and the assessing of planning applications for retail development. The primary aim of the Guidelines is to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector in accordance with proper planning and sustainable development. The Guidelines provide advice on the preparation of Joint or Multi-Authority Retail Strategies which underpin the plan led approach to retail development.

The key objectives of the Guidelines are to ensure that retail development is plan led, enabling the sequential progress of quality developments, in suitable locations with quality urban design. New development proposals should prioritise the vitality of City/Town Centre and facilitate the shift towards easier access to retail via active and sustainable travel options.







From a national policy perspective, the Framework for Town Centre Renewal, the Town Centre First Policy and The Report of the Night-Time Economy Taskforce have all been reviewed for best practice models for developing vibrant city centres with a mix of retail, food and beverage, leisure and arts offerings. The recommendations and objectives as set out in this Strategy have been developed in alignment with these policy documents to ensure a consistent, and proactive approach to delivering vibrant and sustainable city and town centres.

The RSES NWRA 2022-2032, is a high-level document with the overarching aim of supporting the implementation of the NPF at regional level. It provides a strategic framework through which the policies and objectives of the NPF are delivered over a twelve year period. The RSES promotes a coordinated, co-operative, and collaborative approach between each of the Cities and Key Towns within the region through the establishment of Metropolitan Area Strategic Plans (MASPs) for the Galway City and Metropolitan Area and the identification of Regional Growth Centres and Key Towns.

Specific to retail, the central objective for the Galway Metropolitan Area Strategic Plan (MASP) is to provide a strategic focus on the city and its environs. Furthermore, a primary objective of the MASP is to enhance the city centre as the primary commercial area within the city supporting a range of retail, commercial, tourism, social and cultural activities. Outside of the city centre, the MASP identifies a three-tier retail hierarchy for Galway City and Metropolitan Area, which includes: District Centres, Neighbourhood Centres, and Small-Scale Shops.

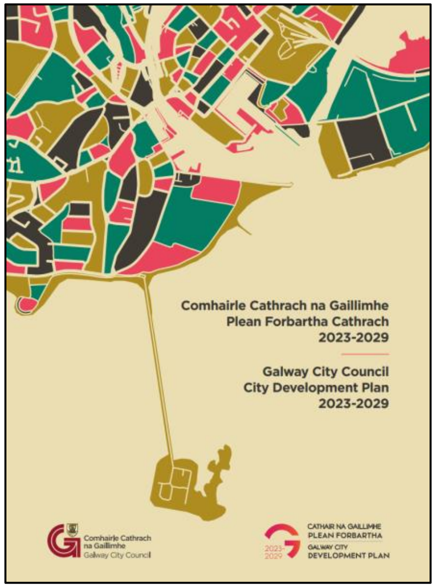
The Galway Transport Strategy (GTS) 2016, is an integrated plan developed by Galway City Council and Galway County Council, in partnership with the National Transport Authority. The strategy sets out a framework to address the transport issues in Galway City and environs over the next 20 years. The GTS is guided by three key principles which include: promoting the use of sustainable transport options, managing traffic for increased mobility and safety of the users, and developing the public transport infrastructure across Galway City and environs. The strategy emphasises the importance of encouraging the use of public transport, cycling, and walking to reduce the reliance on cars. It also focuses on effective traffic management to ensure safe and smooth movement throughout the city, reducing congestion and improving the journey times. The strategy has several implications for the retail sector in Galway. By adhering to its core principles, the strategy seeks to support a high quality retail environment, that attracts increased footfall, thereby boosting the retail activity in the city centre. This strategy reinforces the importance of integrating and supporting the measures set out in the GTS to improve accessibility and the overall quality of the retail environment. Such a coordinated approach will contribute to improving the vitality and vibrancy of our retail centres.

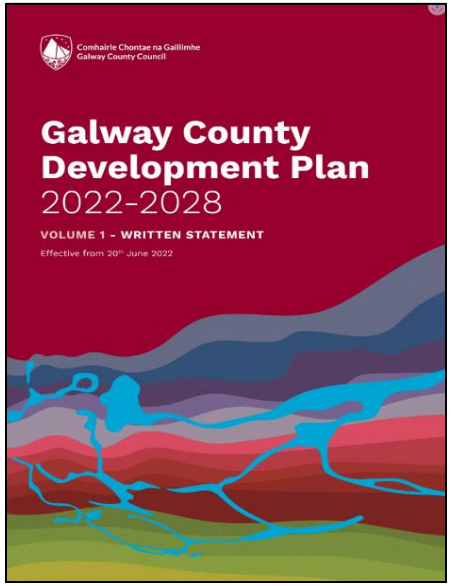
The County Development Plan incorporates as Appendix 3 the Galway County Transport and Planning Study (GCTPS) 2022-2028. This Study provides an assessment of existing transport networks and services within the County. Current and predicted future patterns of movement have been applied alongside consideration of known and planned growth, allowing for a series of options for transport improvements and related measures to be developed. The GCTPS seeks to actively promote and support improvements to the transport networks which will encourage greater use of sustainable transport by existing populations, reduce car dependency and support new development in locations where sustainable travel choices can be encouraged and facilitated through existing and upgraded infrastructure and other measures, including in the MASP area. The GCTPS is distinct from and separate to the published Galway Transport Strategy. However, the GCTPS does consider the relationship between travel demand to and from Galway City by residents of and visitors to Galway County and the associated impacts upon travel choices and use of the transport networks within the County area

The Wild Atlantic Way (WAW) Tourism Strategy 2023-2027 focuses on guiding the tourism development in the region, which also supports employment. The strategy recognises tourism as the largest employer in WAW region. For the southern part of the region, including Galway, the strategy aims to boost the overall catchment and recognition of the wider area as a destination, leading to increased tourism and consequently more job opportunities. While the strategy does not explicitly mention the retail sector, the increased footfall from enhanced tourism flow can benefit retail businesses in Galway. The higher number of tourists can contribute to greater footfall in the retail areas, thereby leading to increased spendings in local shops.

From a local policy perspective, Galway City Development Plan 2023-2029, Galway County Development Plan 2022-2028, Galway City Tourism Strategy 2020-2025, Galway County Tourism Strategy 2023-2031, and Galway Public Realm Strategy 2019 were assessed as part of the policy review.

The Galway City Development Plan 2023-2029 outlines a comprehensive strategy for retail development in Galway. The Plan acknowledges retail being a significant contributor to the economy of the city. The CDP emphasises the necessity of implementing proactive retail policies to safeguard the vitality of existing retail in the city centre, including establishing a clear retail hierarchy to ensure balanced development across various tiers of retail. It also proposes the expansion of the retail floorspace within the city and at town and district centres across the metropolitan area. The Plan outlines several regeneration sites that have the potential to host several functions, including retail. These key sites have been carefully considered in the development of this Joint Retail Strategy.





Similarly, the Galway County Development Plan 2022-2028, sets out several policy objectives for retail development in Galway County. The Plan emphasises the importance of directing retail expansion into designated town centres, to promote them as the focal point for commercial activity. The CDP also promotes the development of appropriately scaled new retail development in centrally located towns and villages of the county. Several of these towns are identified for inclusion within the Joint Retail Strategy, particularly Baile Chláir, Bearna and Oranmore. The other key area of intervention includes identifying targeted measures to tackle vacancy and dereliction, promoting the development proposals for off peak evening and late night uses within or immediately adjacent to town and village centres.

The Tourism Strategies for Galway City and County both aim to promote synergies between tourism operations and retail offerings in the city for the benefit of an enhanced overall city tourism offering. The retail sector within Galway is uniquely positioned to capitalise on the synergies that can be created with the tourism industry. Protecting Galway's status as a competitive retail driver in the west will enable commercial and tourism related activities creating a multi-functional environment that will allow the region to prosper. This strategy recognises the need to preserve and enhance the city centre as the primary commercial area within the MASP region which the tourism sector will play an active role in achieving.

The Galway Public Realm Strategy 2019, presents an evaluation of the current state of Galway City's townscape and public spaces, outlining a series of project proposals of different scales that will improve Galway's streets and public spaces over a period of time. The Joint Retail Strategy will complement the Public Realm Strategy by enhancing the commercial vibrancy of Galway's City Centre. The integration of retail initiatives with public space improvements will overall foster a thriving economic environment, making Galway a more desirable destination for shopping, and leisure activities.

2. Socio-Demographic and Economic Retail Drivers

2. Socio-Demographic & Economic Retail Drivers

2.1. Population and Households

2.1.1. Current Population and Distribution

The Metropolitan Area is characterised by population growth that is comparable to that of Ireland overall, with the city showing a slightly lower increase than the county parts of the Metropolitan Area (Oranmore, Bearna, Baile Chláir, and surroundings). As the number of young people decreases and the number of older people increases, the society ages without yet having an impact on average household size. In Galway City, the share of young adults is significantly higher than in County Galway, which is related to Galway City being a university city. While the growing population generally provides an opportunity for retail, changing age group patterns may also create challenges in certain retail segments.

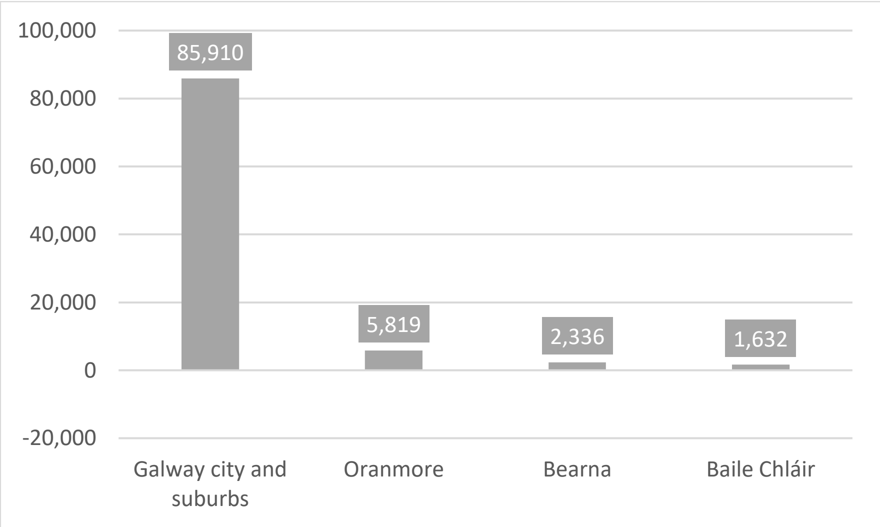


Figure 4: BUA Population Figures (Source: KPMG Future Analytics, based on CSO Census 2022 data)

Within the Metropolitan Area, there was a significant range in population change between 2016 and 2022. While nearly all EDs (25 out of 30) experienced growth, for 10 EDs growth was above 10%.

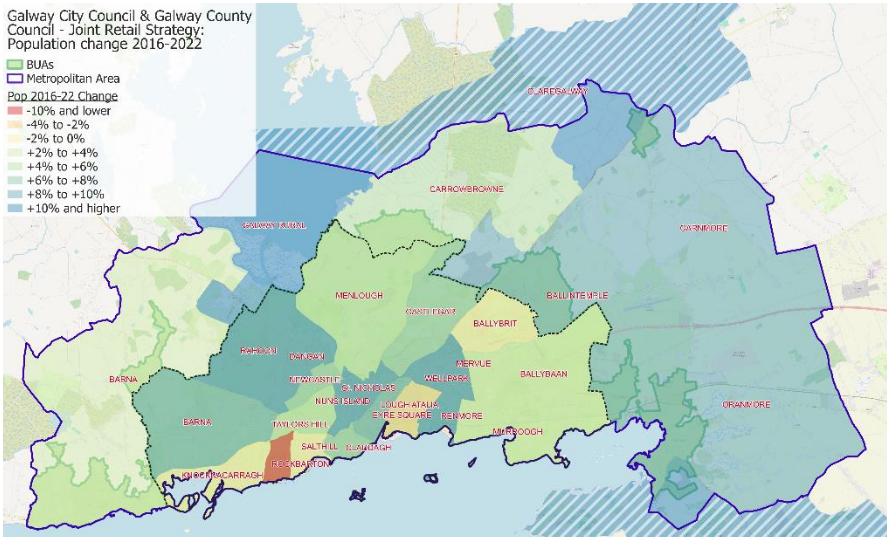
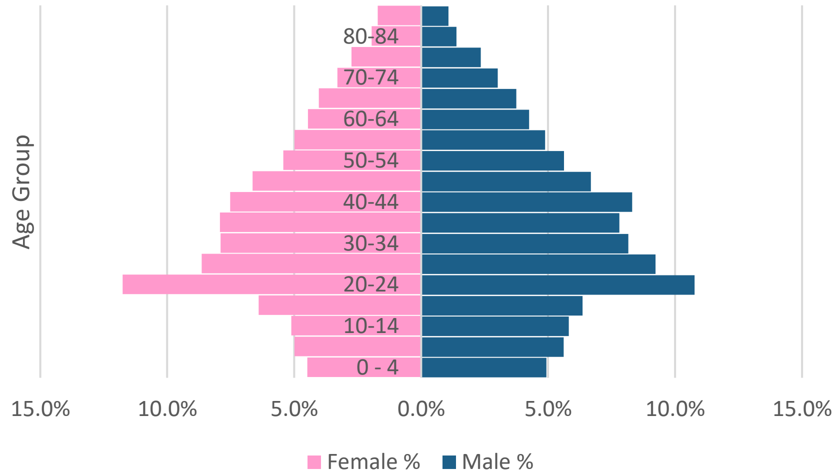


Figure 5: ED Population Figures (Source: KPMG Future Analytics, based on CSO Census 2022 data)



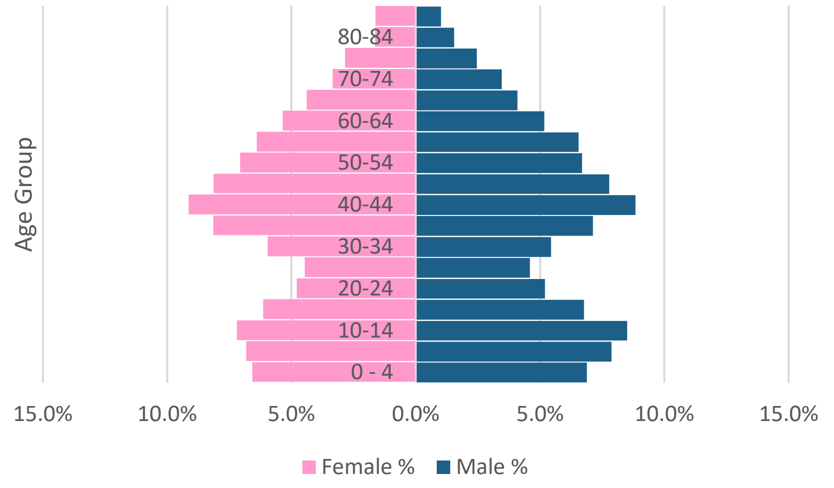


Figure 6: Population by age group within in Galway City parts (above) and Galway County parts (below) of the study area (Source: KPMG Future Analytics, based on CSO data)

2.1.2. Population Projections

Various population targets have been set out in the NPF, RSES, the CDPs and HNDAs, and the NPF First Revision 2025. These projections relate to individual components of the Metropolitan/ study area or for the wider region. Two scenarios are derived from the 2016-22 population trend and the existing population targets and are broken down for each relevant spatial component within the study area. Scenario 1 ("Trend") continues the 2016-22 population trend to 2040. Scenario 2 ("Accelerated growth") aligns with NPF First Revision 2025, RSES, and County Development Plan projections. As Scenario 2 is in line with up-to-date policy documents, this scenario is used as the preferred scenario for the purpose of the retail strategy. The scenario sets out significant growth of 48,492 persons, or 46%, particularly centred in the four BUAs Galway City and Suburbs, Oranmore, Bearna, Baile Chláir. Achieving this population target would present a significant opportunity for retail.

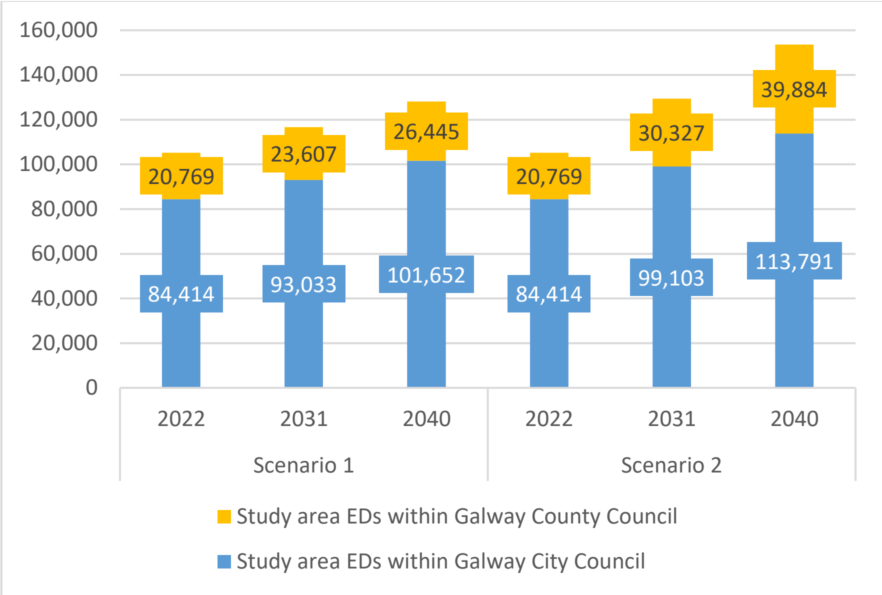


Figure 7: Projected 2031 and 2040 population trend for Study area components (Source: KPMG Future Analytics, based on own calculation based on trend analysis, and NPF First Revision 2025)

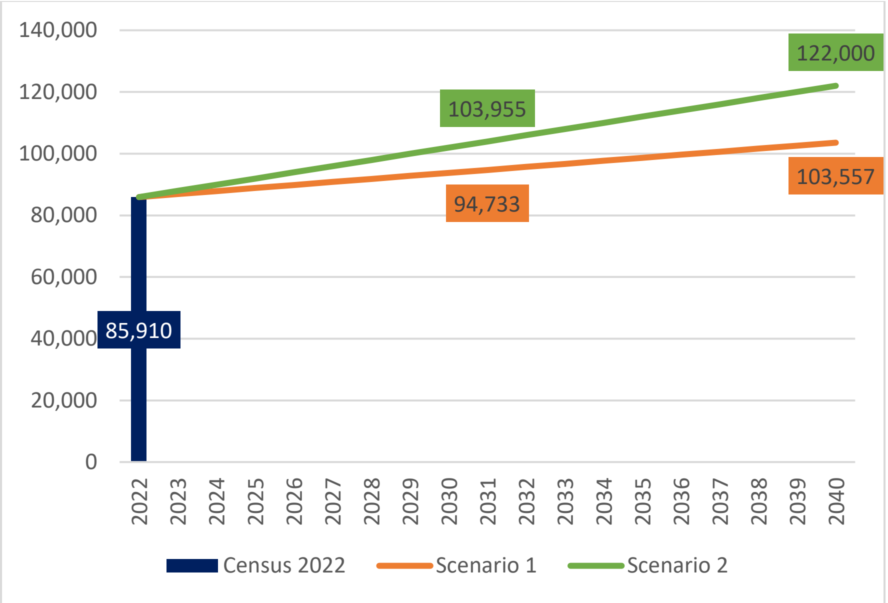


Figure 8: Projected 2022-2040 population trend for Galway City and Suburbs BUA (Source: KPMG Future Analytics, based on own calculation based on trend analysis, and NPF First Revision 2025)

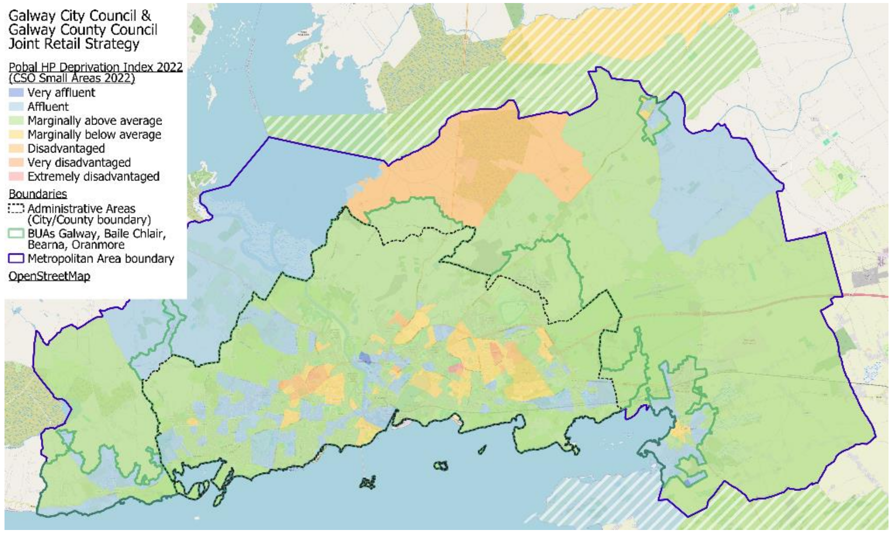


Figure 9: Pobal HP Deprivation Indices, 2022, SA level (Source: KPMG Future Analytics, based on Pobal HP Deprivation Indices data)

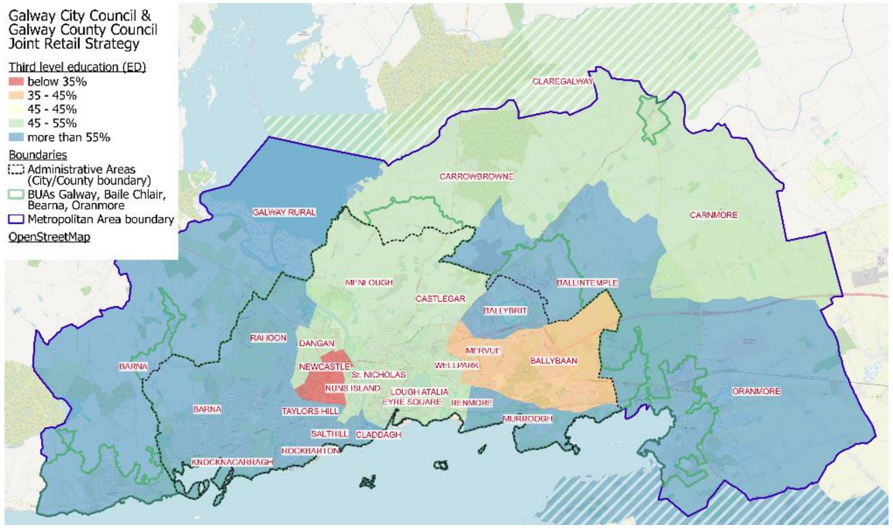


Figure 10: Percentage of Persons with Third-Level Degree as Highest Level of Education, 2022, ED level (Source: KPMG Future Analytics, based on CSO data / OpenStreetMap)

2.1.3. Relative Affluence, Educational Attainment, Unemployment

Compared to the national level, the Metropolitan Area is considered ‘marginally above average’ in the Pobal HP Deprivation Index, with some parts of the Galway City inner suburbs showing higher levels of deprivation.

The Metropolitan Area also has a high percentage of persons with third-level education, with the percentage being generally higher in the outer suburban parts of Galway City as well as areas in the County. Both indicators point to positive conditions for income which provides an opportunity for retail.

Unemployment levels in the Metropolitan Area are in line with the national level, with higher rates noted in central areas and areas in the eastern suburbs of Galway City, and lower rates in the County and the westernmost suburbs of Galway City.

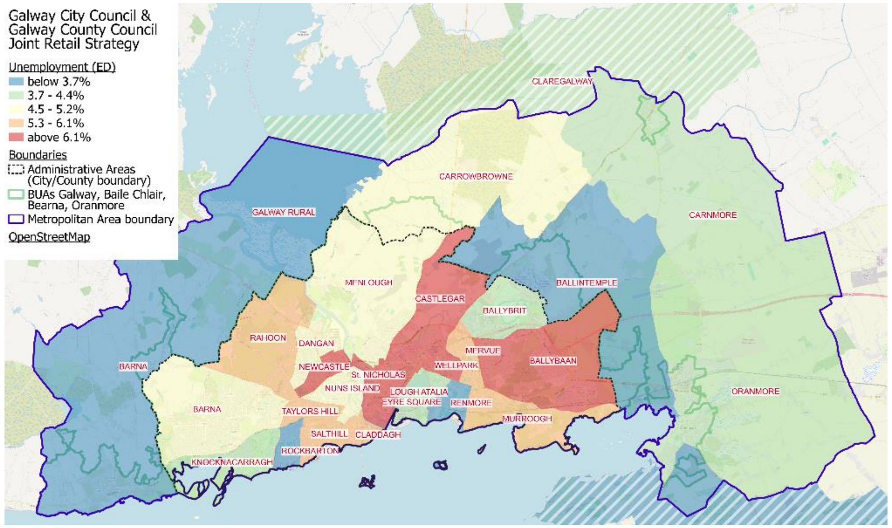


Figure 11: Percentage of Persons in Principal Economic Status 'Looking for first regular job', 'Short term unemployed' and 'Long-Term unemployed' among Persons Aged 15 Years and Older (Source: KPMG Future Analytics, based on CSO data / OpenStreetMap)

2.1.4. Retail Employment

While the number of enterprises in retail in Co. Galway (including Galway City) in total has remained stable in the past years, the number of persons engaged in active retail enterprises has fluctuated. Over the intercensal periods 2011-16 and 2016-22, a decline of persons in the six primary retail-related occupations has been observed, indicating structural challenges around staffing for retail.

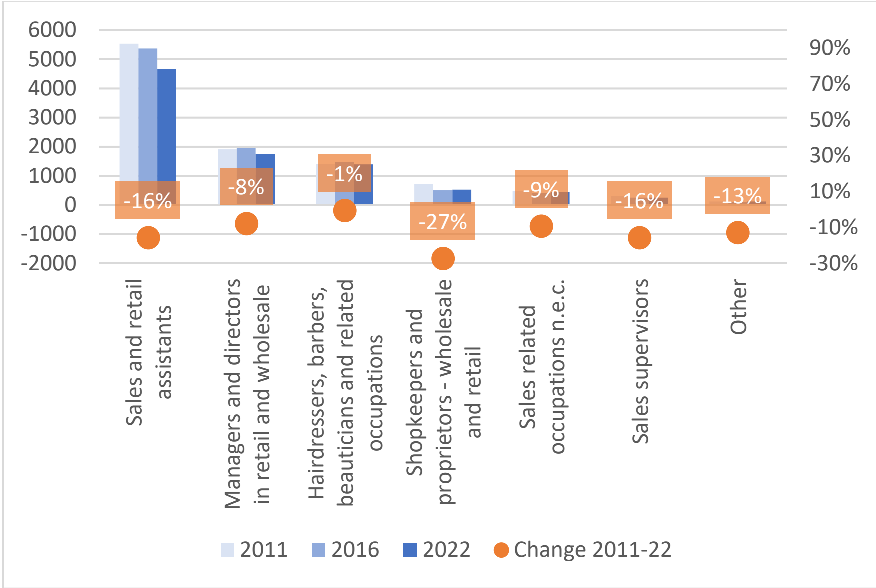


Figure 12: Population aged 15 years and over in the labour force employed in retail-related occupations, 2022 in Co. Galway. (Source: KPMG Future Analytics, based on CSO)

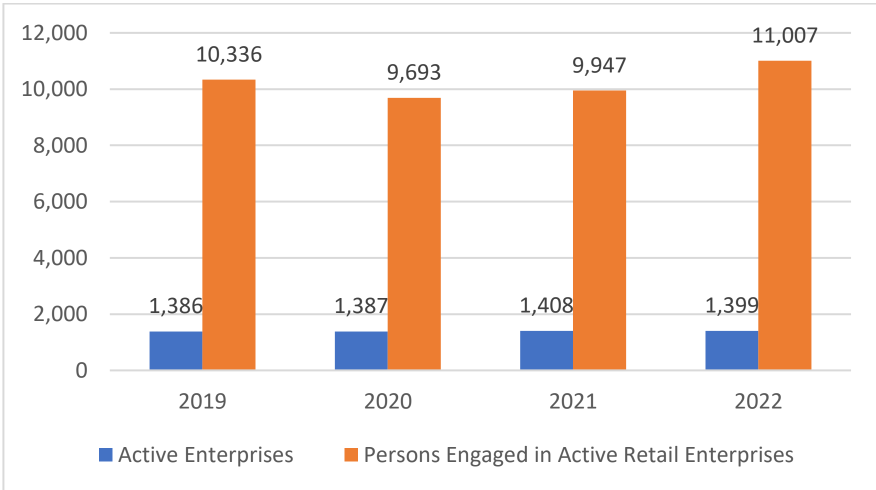


Figure 13: Active enterprises and persons engaged in active retail enterprises in Co. Galway, 2019-2022 (Source: KPMG Future Analytics, based on CSO Business Demography statistics)

2.2. Household Expenditure

2.2.1. Retail spending

Personal expenditure on consumer goods and services has rebounded from a decrease during the Covid19-pandemic. Post-pandemic trends for retail sales values have rebounded even more strongly, leading to accelerated growth when compared to before the pandemic. While both trends relate to the national level, there are opportunities for retail in the study area, particularly when considering retail inflow from the wider region.

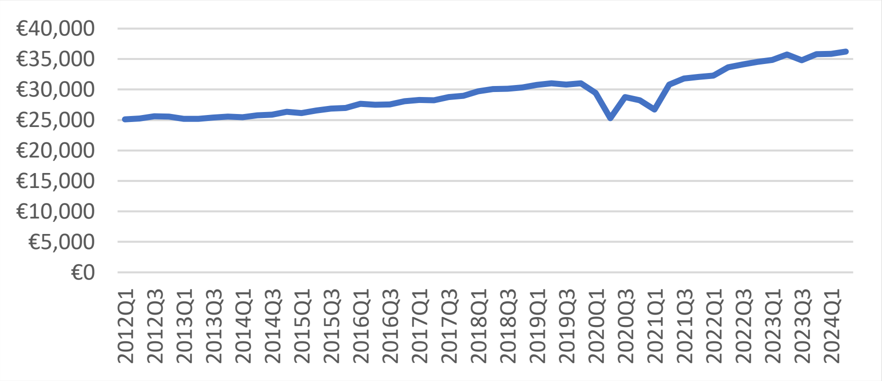


Figure 14: Personal expenditure on consumer goods and services growth in Ireland (Source: KPMG Future Analytics based on CSO personal expenditure data)

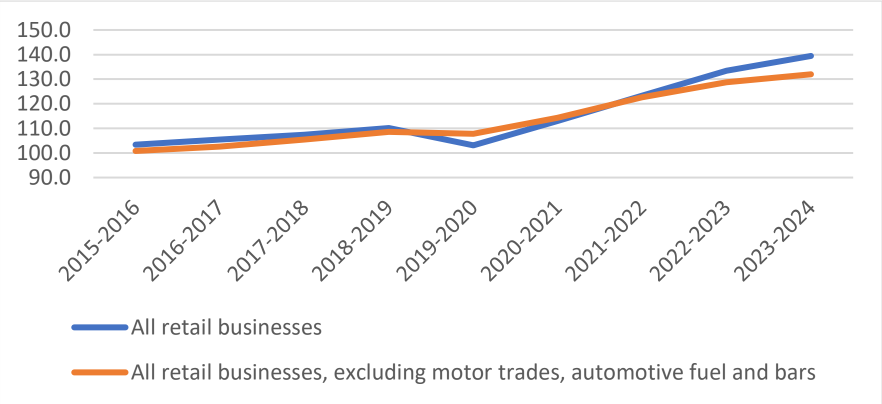


Figure 15: Growth in retail sales values in Ireland (Source: KPMG Future Analytics based on CSO retail sales value data)

2.2.2. Earnings, Employment, and Consumer Sentiment

Earnings and medium personal income in County Galway have increased in line with increases on the national level. At the same time, expenditure on retail-aligned activities (national data) has increased over the past years. This coincides with inflationary pressures particularly in the segment of food (convenience) products. Consumer sentiment on the national level shows an increasingly optimistic outlook following the Covid19-pandemic. Generally, these statistics point to a positive outlook for retail, although there are concerns regarding the potential future spend on non-convenience goods.

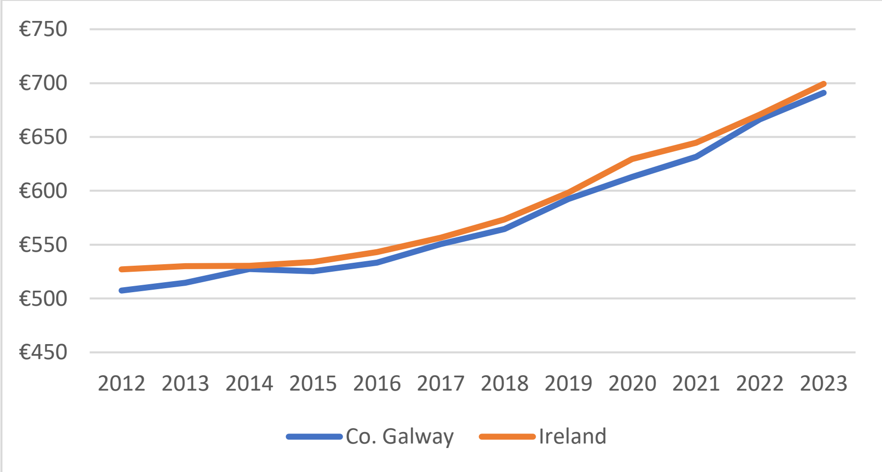


Figure 16: Median Weekly Earnings in Co. Galway and Ireland, 2012-2023 (Source: KPMG Future Analytics, based on CSO Mean and Median Weekly Earnings)

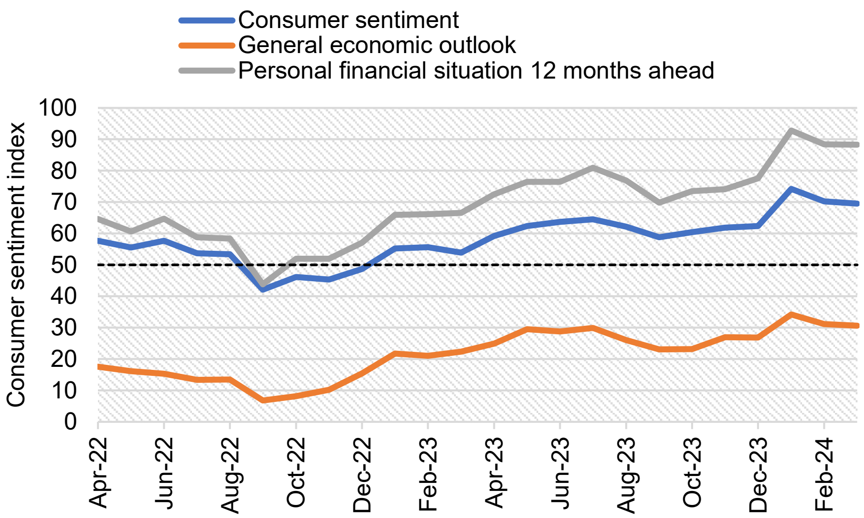


Figure 17: Consumer sentiment at National level

2.3. Macro Trends in Retail

2.3.1. Consumer Behaviour

In the Republic of Ireland, the retail landscape is undergoing continuous evolution due to shifts in consumer patterns, unpredictable global and local economic events, socio-cultural shifts, and various technological advancements. Therefore, retailers must adapt to evolving market dynamics to ensure that consumer needs are met. Some key findings indicate that apparel is the primary driver of online shopping, groceries are the most popular type of convenience store, customers prefer large shopping centres, the majority consumers prioritise quality over price, and the younger generation is increasingly adopting cashless payment methods.[1] [2] [3]

2.3.2. Online Retail Landscape

Nationwide, the percentage turnover generated by online retailers is drastically increasing. Online shopping continues to grow but with variations by category (e.g., fashion and gifts is growing faster than homeware, groceries). The majority prefer to buy clothes, fashion, and gifts online or hybrid (a mix of online) whereas some people prefer to purchase homeware and groceries in store.

The bricks and mortar retailers are facing significant challenges to sustain due to the increasing customer shift towards online retailing.[4] With many staple high street retailers, such as Debenhams and Argos, closing their doors nationwide and in Galway between 2021 and 2023, this has further highlighted the changing face of the high street as well as the increased competition posed by online retailing. Another significant shop closure in Galway is the New Look clothing store in Eyre Square Shopping Centre, which shut down in January 2022 after 15 years of operation. At the same time, this presents an opportunity for a rethink of the overall retail environment (i.e., focus on smaller, independent retailers/ more specialised stores).

[1] KPMG - Next Gen Retail: The cautious consumer

[2] Forecourt and Convenience Retail - Ireland 2023 -Mintel

[3] Discounters - Ireland - 2023 - Mintel

[4] Mintel: Online and Mobile Retailing – Ireland – 2024

The rapid expansion of the Irish market is attributed to the underdeveloped online market among Irish retailers. However, these retailers are increasingly recognising the benefits of maintaining an online presence alongside their physical stores. This dual approach aims to enhance their online capabilities and visibility, enabling them to seize new opportunities and attract a broader customer base. To accelerate retailer's online presence and increase competitiveness, the 'Online Retail Scheme' was launched in 2018 by the Department of Trade and Enterprise (DETE) Ireland. Since 2018 more than 850 projects from retailers based in Ireland have been approved for €30.7 million in funding through the government's Online Retail Scheme.[5]

The expansion of online retail in the Republic of Ireland is projected to thrive in the forthcoming years. Despite economic challenges and the high cost of living dampening the retail market in the short term, total expenditure is expected to increase. The growing popularity of online retailing amongst people is revolutionary and presents an opportunity to the local shops to invest in the online infrastructure, however, it also possesses some serious threats to the traditional retailing landscape resulting into a decreasing footfall and sales in the physical stores.[6]

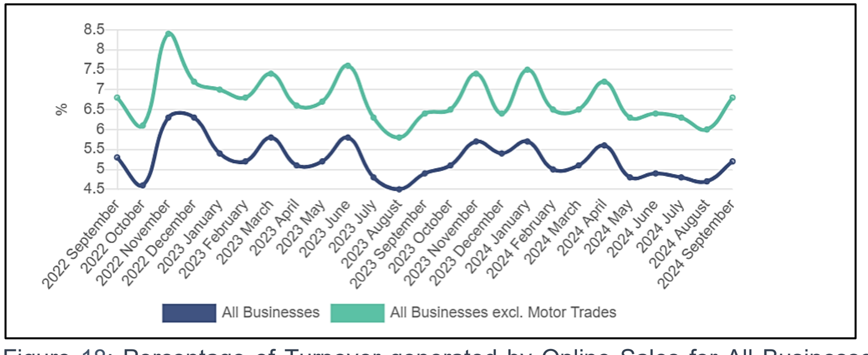


Figure 18: Percentage of Turnover generated by Online Sales for All Businesses and All Businesses excl. Motor Trades in Ireland, 09/2022 – 09/2024 (Source: CSO, Ireland)

[5] Online Retail Scheme - DETE

[6] Next Gen Retail: The changing shape of the high street

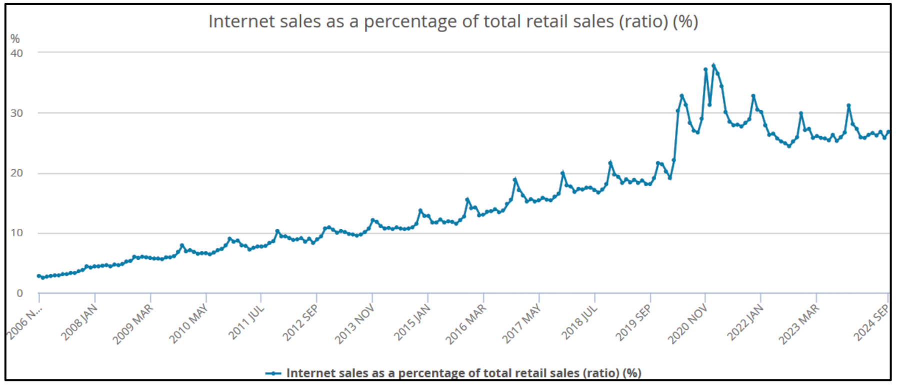


Figure 19: Internet Sales as a percentage of total sales in Ireland from 2006-2024 (Source: CSO, Ireland)

2.3.3. Role of Technology and Generative AI in Retail

The advancement of technology and the emergence of generative AI are poised to significantly transform the retail industry. Although the AI landscape is still in its early stages, it is expected to become increasingly commercialised in the coming years. According to a KPMG article, AI has the potential to revolutionise various aspects of retail, including automating manual tasks, offering automated customer service, analysing consumer behaviour, and preventing product loss due to theft and expiration.[7]

Generative AI presents significant benefits to retailers and consumers. Enhanced automation can reduce costs, monitor levels of carbon emissions and waste and ultimately help in improving sustainability. AI also presents opportunities for greater analysis of consumer behaviour which can help identify emerging trends and allow retailers to adapt and modernise accordingly. However, AI also poses threats to the traditional brick-and-mortar shops as customers are shopping online more frequently due to the convenience that such platforms offer. In order to respond to evolving consumer demands and habits, traditional retailers are implementing AI-enabled IoT solutions to improve store efficiencies and create a more

[7] How will AI change retail? - KPMG Ireland

personalised shopping experience for consumers. In its report, Iot + AI in Retail (KPMG 2022), KPMG found that the M&A market has been flourishing as retail giants and private equity firms strategically invest in technology providers implementing IoT and AI solutions that streamline the operational efficiency of neighbourhood brick & mortar stores.[8]

Given the rise of generative AI, it is beneficial for retailers of all scales to leverage this technology. Over the coming years, education, and training in AI within the retail industry will be essential.[9]

2.3.4. Emerging Sustainability in Retail

Sustainability is an emerging trend as well as a significant focus in Ireland's retail sector. With the growing awareness around sustainability, consumers are becoming cautious about the eco-friendliness of the products that they purchase. Ireland's Climate Action Plan (CAP) 2024, which targets net zero emissions by 2050, makes it a regulatory requirement for businesses to be a part of this nationwide goal. As the policy landscape evolves, retailers will need to adopt circular economy practices.

For retailers, the circular economy is no longer a choice but a business critical. In its latest report, From Talk to Action: Paving the Way for a Circular Economy in the Consumer Goods and Retail Industry, KPMG found that the fashion and food and beverage sub-sectors are leading the way in this indicator with clearly stated ambitions and strategies, whereas, retail sub-sector companies are prioritising waste reduction and packaging reuse.[10]

By harnessing collective efforts, a sense of responsibility towards nature and the environment, and adapting to the evolving policy and regulatory landscape, the retail industry is accelerating its transition to a circular economy.

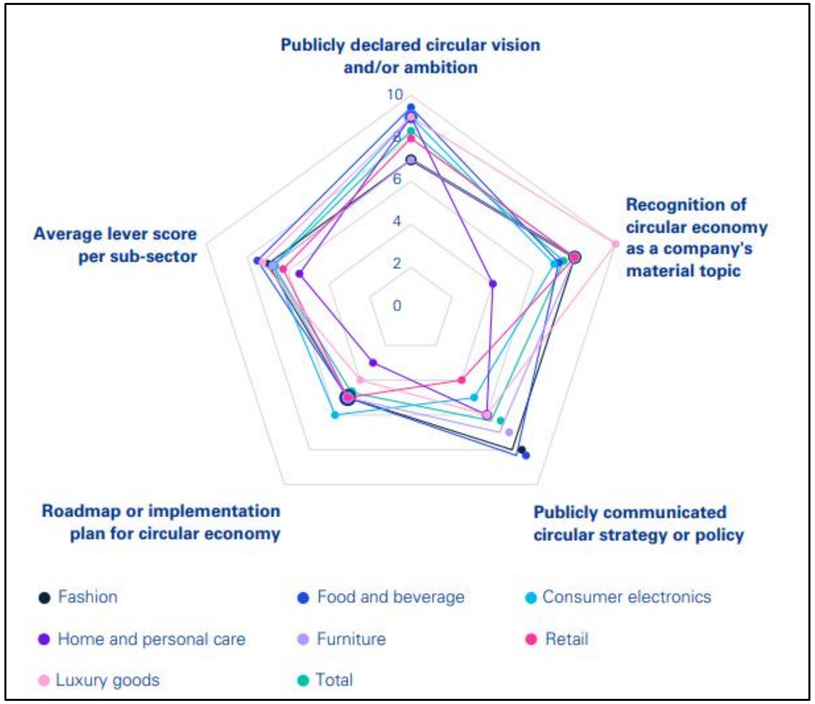


Figure 20. Consumer Goods and Retail Circularity Assessment (Source: KPMG from talk to action: Paving the way for a circular economy in the consumer goods and retail industry)

8 IoT+AI in Retail

9 KPMG: AI and the orchestrated customer experience

10 Circular Economy Report - KPMG

3. Retail Landscape in the Galway Metropolitan Area

3. Retail Landscape in the Galway Metropolitan Area

The Galway retail landscape is characterised by a clustering of retail throughout the city, as well as the Metropolitan Settlements of County Galway, Oranmore, Bearna, and Baile Chláir.

3.1. Retail Hierarchy

The Retail Planning Guidelines recognise the important role city centres play in the spatial structure of the country, the region, and wider cities. To ensure the vitality and viability of the city centre, restrictions are placed on the location and floor size of retail, and a Sequential Approach for the location of retail is mandated.

The adjacent table outlines the retail hierarchy within the study area, as specified in the Galway City Development Plan and the Galway County Development Plan. Several major retail areas are not included in the retail hierarchy, notably commercial clusters along the main arterial roads to and along Bóthar na dTreabh. It should be noted that the retail hierarchy in the City and County Development Plans are not aligned, with District Centres in the city and Small Town/ Neighbourhood Centres in the county being assigned to different tiers. Figure 21 illustrates the location of the relevant centres within the study area.

Galway City and County Councils will strive to align the retail hierarchy in future City and County Development Plans.

Tier	Defined retail area
Level 1 Metropolitan Centre (as per Galway City Development Plan, Galway County Development Plan)	Galway City Centre
Level 2 Town Centre (as per Galway City Development Plan)	*Not within study area*
Level 3 District Centres (as per Galway City Development Plan) / Level 2 District Centre (as per Galway County Development Plan)	• Knocknacarra • Westside • Doughiska • Ardaun (planned)
Level 3 Small Town Centre in Metropolitan Area (as per Galway City Development Plan) / Tier 4 Neighbourhood Centre (as per Galway County Development Plan)	• Baile Chláir • Bearna • Oranmore • Garraun • Briarhill
Level 5 Neighbourhood Centre (as per Galway City Development Plan)	• Knocknacarra (Shangort) • Doughiska (Doughiska Rd.) • Roscam • Mervue • Castlegar • Ballinfoile • Salthill, • Wellpark/Renmore
Level 5 Small Town/ Village centre / Rural Area (as per Galway County Development Plan)	Not within study area
Level 6 Local Shops (as per Galway City Development Plan)	Corner/Local shops in the City and County

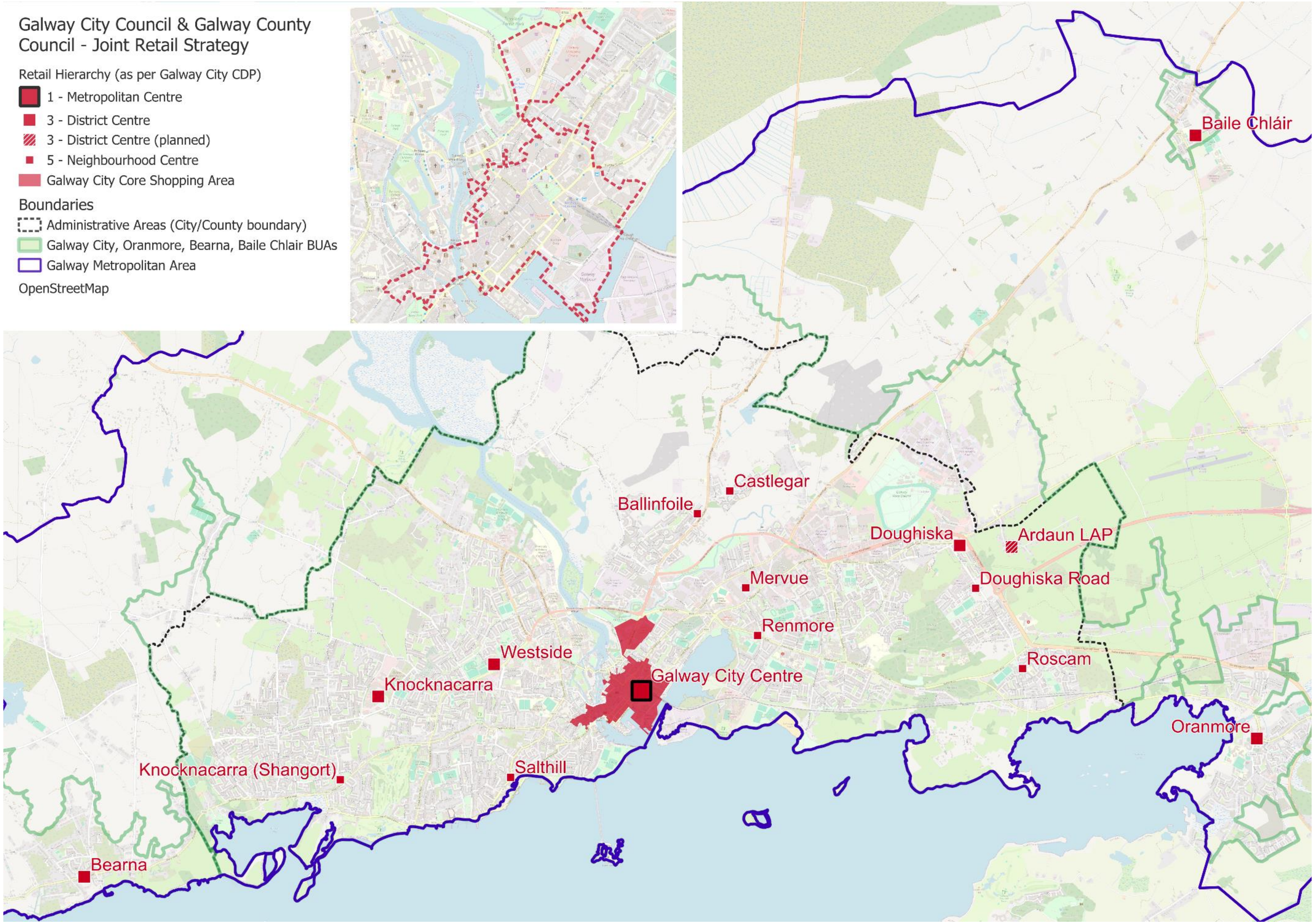


Figure 21. Location of the relevant centres within the study area (Source: KPMG Future Analytics)

3.1.1. Galway City Centre - Core Shopping Area

The Core Shopping Area is the principal retail area within the study area and is required to be defined for the purposes of the retail strategy in accordance with the Retail Planning Guidelines (2012). Galway City is considered a Metropolitan Centre as it 'provide[s] a range of high-order comparison shopping which is largely unmatched in smaller cities and towns'[11].

The Galway City Development Plan defines the Core Shopping Area as comprising the area zoned specifically for city centre purposes, extending to the commercially zoned lands at Headford Road, south of the Bodkin junction. This is the established central shopping area of the city and includes a significant amount of high order comparison retailing and specialist services. It also includes significant regeneration sites which can accommodate mixed use development including retail.

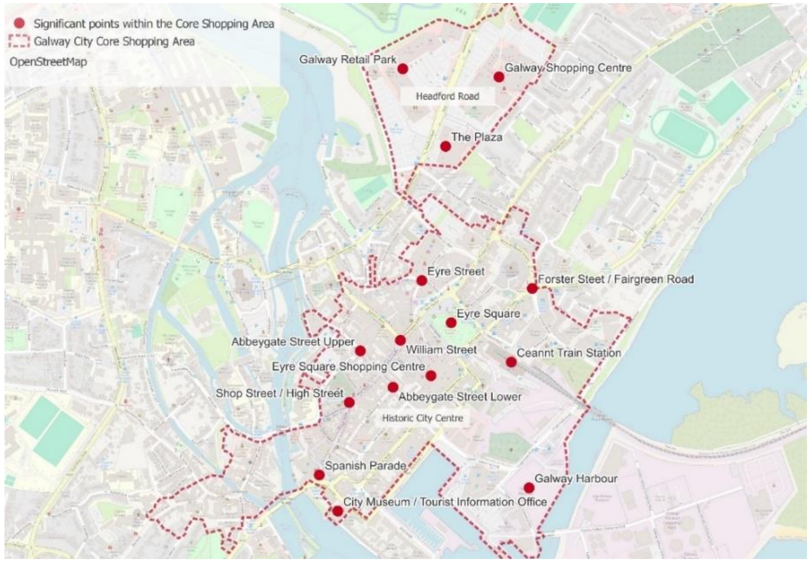


Figure 22: Core Shopping Area in Galway City (Source: KPMG Future Analytics, based on Galway City Development Plan 2023 – 2029)

The CDP sets out goals for the future development of the Core Shopping Area which focus on expansion and diversification, vacancy reduction, regeneration of spaces, and improving accessibility.

3.1.2. District Centres in Galway City

Within the city, Level 3 District centres represent the next tier (after the Core Shopping Area) in the retail hierarchy. District centres 'provide a range of retail and non-retail functions (e.g., banks, post office, local offices, restaurants, public houses, community and cultural facilities) for the community'[12]. They are 'characterised by large multiple anchors with a mix of convenience and comparison goods [and] […] serve the local catchment and their day-to-day needs[13]. The three district centres according to the City Development Plan are Knocknacarra, Westside, and Doughiska. An additional district centre is planned for the new neighbourhood of Ardaun. The City Development Plan formulates goals for further development that consider the distinct nature of each of the centres.

3.1.3. Neighbourhood Centres in County Galway

Town Centres, referred to as Neighbourhood Centres in the local retail hierarchy, serve to 'provide a broad range of facilities and services and fulfill a function as a focus for both the community and public transport'[14].

The three Neighbourhood Centres in the Metropolitan Area, i.e., Oranmore Centre, Bearna, and Baile Chláir do not have clearly defined boundaries and are only descriptively referred to in the Galway County Development Plan. The plan refers to the Sequential approach to be considered regarding retail development (RET 2)[15] and formulates a number of policy objectives for Core Shopping Areas.[16]

3.1.4. Retail Warehousing/ Bulky Goods in the Metropolitan Area

The City Development Plan names Liosban, Briarhill, Headford Road, Tuam Road, Seamus Quirke Road, and Wellpark as predominant sites for retail warehousing/ bulky goods in Galway City. The CDP acknowledges that

[11] Retail Planning Guidelines (2012), p.11.
[12] Retail Planning Guidelines (2012), p.54.
[13] Galway City Development Plan, p.179.
[14] Retail Planning Guidelines (2012), p.54.
[15] Galway County Development Plan, p.166
[16] Galway County Development Plan, p.169

many sites have evolved in conjunction with industrial areas, business parks, motor sales outlets and areas in transition, in a piecemeal fashion in environments of poor urban quality, designed mainly for car borne customers.'[17] The below map singles out the clusters of Geodirectory data for 'bulky' retail outside the retail hierarchy and seeks to align these with the sites identified in the CDP. The areas are interpreted as;

- Terryland Retail Park (Headford Road in the CDP)
- Briarhill Business Park (same in the CDP)
- Liosban Industrial Estate (Liosban, Tuam Road in the CDP)
- Wellpark Retail Centre (same in the CDP)
- Seamus Quirke Road (same in the CDP)

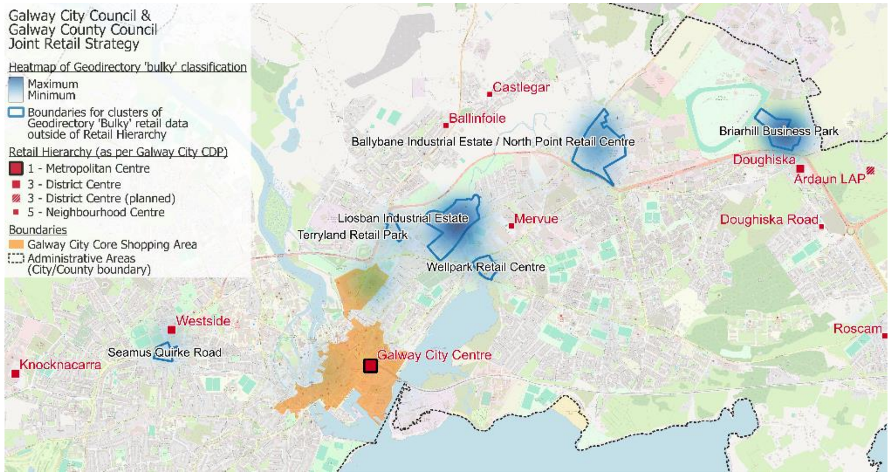


Figure 23: Clusters of bulky retail outside of retail hierarchy (Source: KPMG Future Analytics, based on Galway City Development Plan 2023 – 2029)

3.2. Types of Retail Goods and Geographical Distribution

As of Q2 2024, there were 595 retail facilities present in the Study Area, of which 519 (87%) were in Galway City and 76 (13%) in Galway County Metropolitan area.

A total of 398 (67%) were classified as stores focusing on comparison goods, 120 (20%) as stores focusing on convenience goods, 56 (9%) as stores focusing on bulky goods, and 21 (4%) as petrol stations (which often include convenience stores).

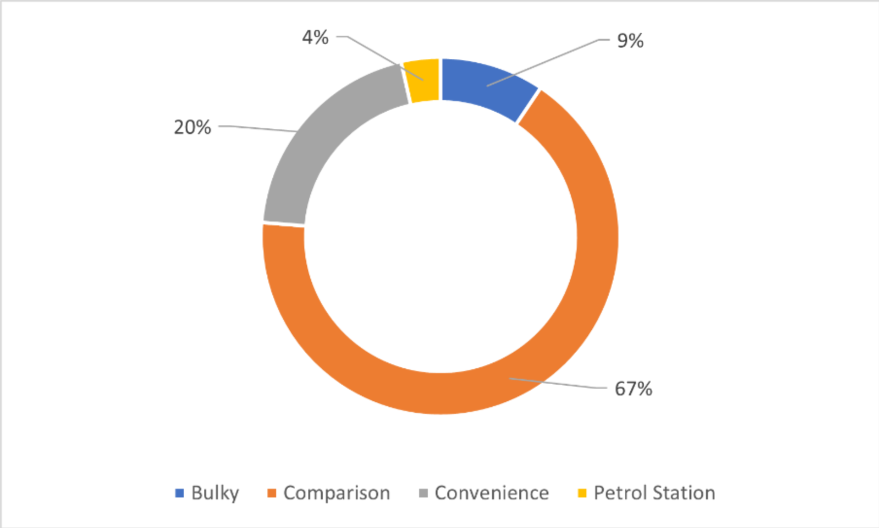


Figure 24: Distribution of Retail in the Galway Retail Study Area by Retail Types (KPMG Future Analytics, based on Q2 2024 Geodirectory data)

The 595 retail facilities in the study area translate into an estimated total of 264,274 sqm of gross retail floorspace. Approximately 85% of all gross retail floorspace is located within Galway City, while 15% is within the Galway County metropolitan area.

[17] *Galway City Development Plan, p.182.*

Table 3-1 Gross retail floorspace in the study area (Source: KPMG Future Analytics based on Geodirectory 2024 Q2 data)

	Galway City	Galway County (Metro)	Total
Convenience	42,372 sqm	15,723 sqm	58,096 sqm
Comparison	140,414 sqm	16,853 sqm	157,267 sqm
Bulky	36,590 sqm	7,303 sqm	43,893 sqm
Petrol station	4,318 sqm	701 sqm	5,019 sqm
Grand total	**223,694 sqm**	**40,580 sqm**	**264,274 sqm**

Convenience stores and petrol stations are distributed throughout Galway City and its suburban areas. A higher density of convenience stores is visible within Galway city and its immediate suburbs, particularly concentrated in central urban areas. Notable clusters also appear along key transport routes and in proximity to residential zones. Additionally, Baile Chláir, Bearna, and Oranmore are served by convenience facilities or petrol stations, ensuring coverage for urban and rural areas.

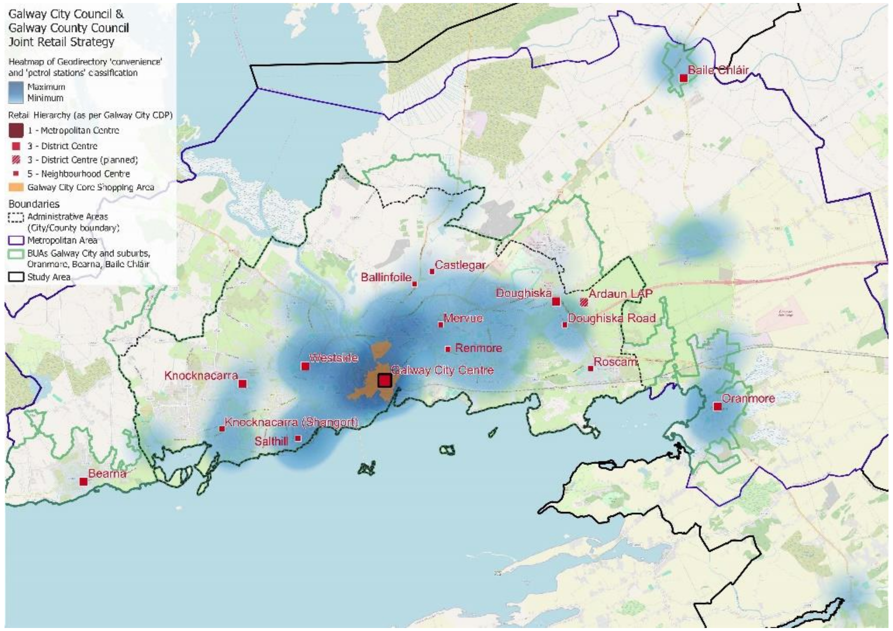


Figure 25: Retail Businesses in the Study Area: Concentration of Retail Types Convenience and Petrol Stations (Source: KPMG Future Analytics based on Q2 2024 Geodirectory data)

Retail stores focusing on the sale of comparison and bulky goods are distributed throughout Galway City and its surrounding suburbs, with significant concentrations in both the city centre and suburban retail locations. Figure 26 highlights strong clusters of these stores along major routes and commercial hubs, including areas like the Galway Retail Park, Briarhill Business Park, and Headford Road Retail Park. Oranmore, Bearna, and Baile Chláir in the County Galway part of the Metropolitan Area also host comparison and bulky goods stores.

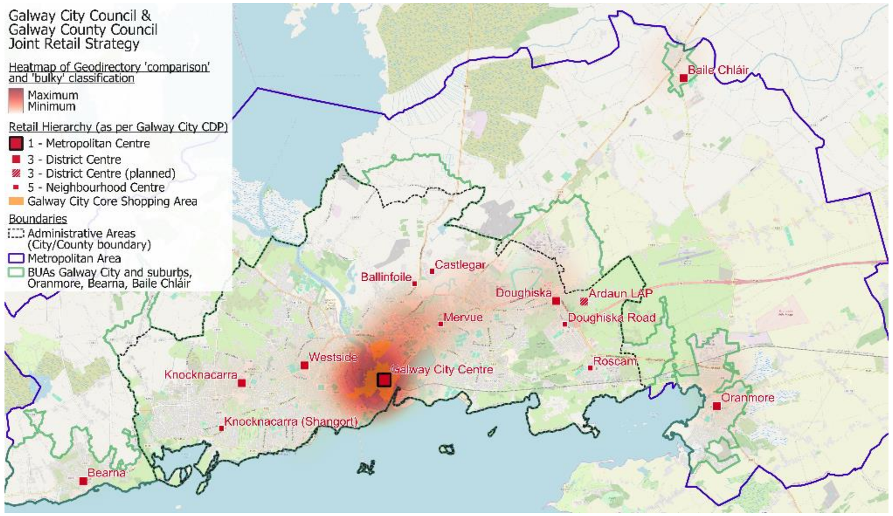


Figure 26: Retail Businesses in the Study Area: Concentration of Retail Types Bulky, Comparison, and Comparison/Bulky (Source: KPMG Future Analytics based on Q2 2024 Geodirectory data)

Figure 26 provides an overview of the concentrations of retail outlets in Galway City Centre. The Core Shopping Area displays a high density of comparison and convenience stores, particularly in and around the main commercial districts. Notable concentrations are visible in the heart of the city near Eyre Square, Shop Street, and along the Headford Road.

In line with the Sequential Approach mandated for the location of retail, the Core Shopping Area and, secondarily, District centres in Galway City and Neighbourhood centres in Galway County are defined as priority areas for new retail floorspace for comparison shopping. Edge-of-centre or out-of-centre locations may only be considered once all other options within the designated retail zones have been exhausted.

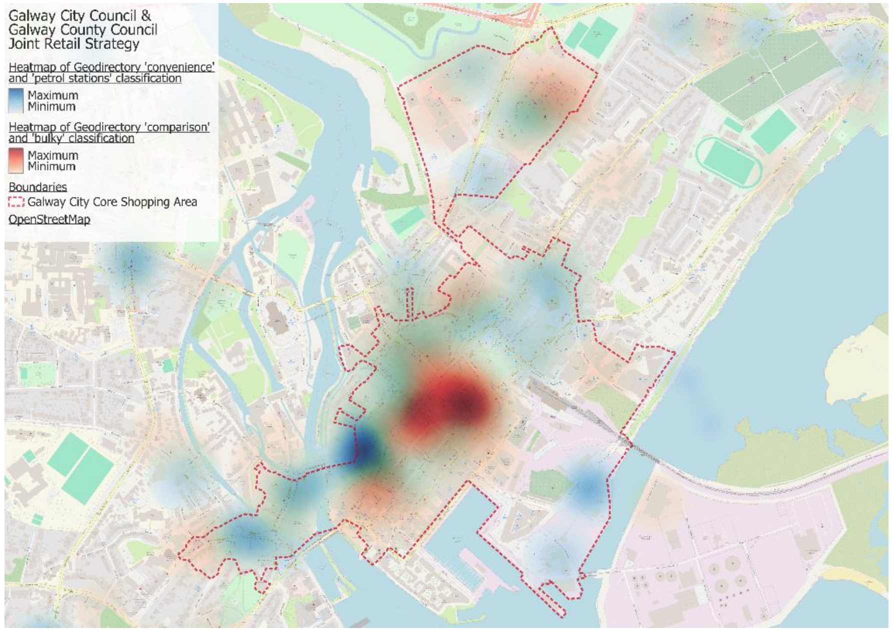


Figure 27: All Retail Businesses in Galway City Centre (Source: KPMG Future Analytics based on Q2 2024 Geodirectory data)

3.3. Retail Vacancy

According to the Geodirectory Commercial Buildings Report Q2 2024, retail vacancy stood at 20.5% in Galway City and suburbs, marginally below the 21.2% for County Galway overall, and the 22.0% nationally.

	Occupied units with NACE Code	Vacancy Rate Q2 2023	Vacancy Rate Q2 2024	Services	Retail and Wholesale	Health	Construction	Industry	Education	Financial	Public Admin
		%	%	%	%	%	%	%	%	%	%
CONNACHT	**20,394**	**17.9**	**18.3**	**49.6**	**22.2**	**9.6**	**4.2**	**4.7**	**5.5**	**1.8**	**2.4**
CO. GALWAY	**8,742**	**18.0**	**18.5**	**50.0**	**21.2**	**10.8**	**3.5**	**4.8**	**5.6**	**2.1**	**2.0**
GALWAY	2,804	19.5	20.9	53.2	20.5	13.9	2.2	2.5	3.7	2.9	1.1
LOUGHREA	274	19.0	18.5	48.5	26.6	10.9	2.9	3.6	2.9	1.8	2.6
TUAM	406	24.8	24.2	43.6	26.1	12.1	2.2	5.9	5.4	2.7	2.0
CO. LEITRIM	**1,356**	**16.8**	**17.5**	**52.6**	**22.3**	**7.1**	**3.8**	**4.1**	**4.8**	**1.9**	**3.4**
CARRICK-ON-SHANNON	293	16.6	16.9	49.8	26.3	9.2	0.7	3.8	3.1	2.7	4.4
CO. MAYO	**5,447**	**17.3**	**17.3**	**49.1**	**23.3**	**8.6**	**4.5**	**4.9**	**5.4**	**1.5**	**2.7**
BALLINA	585	23.5	23.2	45.1	30.1	11.3	2.4	3.2	2.7	2.6	2.6
CASTLEBAR	724	20.8	20.2	46.0	28.7	12.8	2.9	2.6	2.9	1.7	2.3
WESTPORT	439	12.6	11.7	60.1	23.2	6.8	0.9	2.1	3.2	2.5	1.1
CO. ROSCOMMON	**2,349**	**16.9**	**17.4**	**45.9**	**24.5**	**8.8**	**6.3**	**4.6**	**5.8**	**1.3**	**2.9**
BOYLE	163	27.6	27.7	46.6	29.4	9.8	2.5	1.8	2.5	2.5	4.9
ROSCOMMON	412	21.0	19.8	46.8	25.7	14.6	0.7	3.4	3.4	1.9	3.4
CO. SLIGO	**2,500**	**19.9**	**20.5**	**51.0**	**21.3**	**9.4**	**4.7**	**4.7**	**5.0**	**1.6**	**2.4**
INNISCRONE	64	17.1	17.1	59.4	17.2	14.1	0.0	0.0	3.1	0.0	6.3
SLIGO	933	25.4	26.0	48.3	22.4	14.7	2.7	3.5	2.9	2.8	2.7
TUBBERCURRY	127	24.5	23.2	48.8	24.4	9.4	3.1	2.4	2.4	2.4	7.1
NATIONAL	**154,217**	**14.1**	**14.4**	**49.3**	**22.0**	**9.5**	**4.8**	**5.0**	**4.6**	**2.5**	**2.2**

Source: GeoDirectory Database

*Note: *The percentage point changes figures in some of the towns/counties do not work out exactly due to rounding.*

Figure 28: Vacancy Rates – NACE Percentage Breakdown by Town – Connacht Q2 2024 (Source: GeoDirectory Database)

An analysis of the Geodirectory database for the study area yields a similar picture. An approximate 65,504 sqm (gross) is identified as vacant retail floorspace, of which 61,181 sqm (gross) in the Study area is within Galway City and 4,323 sqm (gross) is within the Galway metropolitan area. Within the city centre notable vacancies include several units at Edward Square and the Treasure chest building.

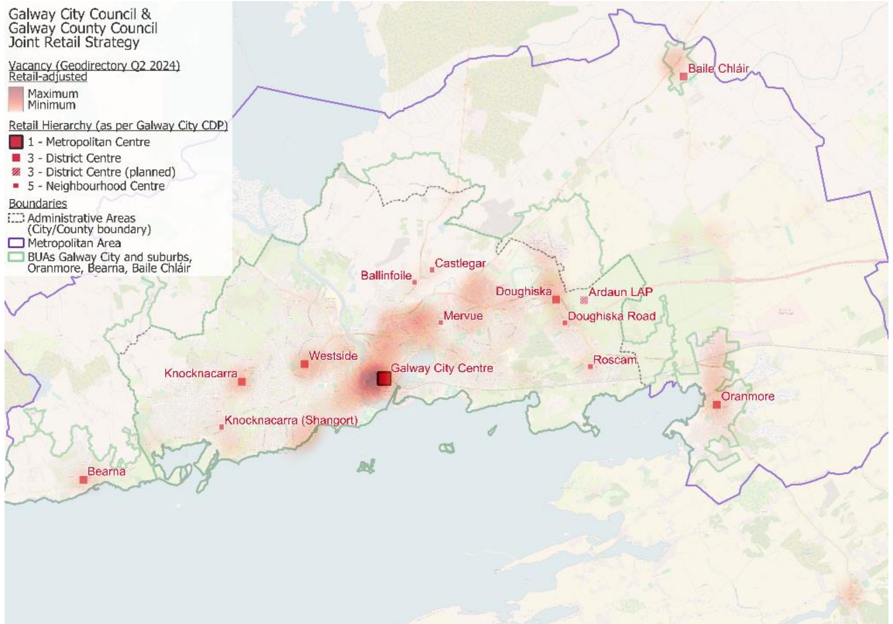


Figure 29: Retail vacancy clusters in the study area (Source: KPMG Future Analytics based on Galway City data)

3.4. Future Pipeline Supply of Retail Space

Galway City

Galway City has a considerable pipeline supply of retail space. The most significant potential floorspace addition is at Ceannt Quarter which is a 5-hectare city centre regeneration site with permission for large-scale mixed-use development (Pl Ref 20/47). This development includes a substantial retail component, with a total gross floor area of 26,449 square meters, encompassing 28 retail units and 2 department stores. In terms of bulk retail, a significant development on Tuam Road (Ref. 2460118) has been noted, resulting in an increase of over 11,000 square meters of retail floorspace.

There are also small-scale retail applications, both convenience and comparison, within the Wellpark Retail Centre and at Crown Square. Various retail developments, ranging from small to large scale, have been identified with clusters around Tuam Road. Table 3-2 sets out planning applications reflecting changes in retail floorspace of 300 square meters or more, whether an increase or decrease. This threshold ensures that the analysis remains focused on significant developments, thereby providing a clearer overview of retail space trends in Galway City.

The analysis of the key commercial planning applications within Galway City indicates a net decrease and increase in retail floorspace across various planning applications. The figures, which are approximate, show a range of changes in retail space, with some applications resulting in a reduction and others in an expansion. There is a notable increase of 33,683 square meters of retail floorspace in the city, and a decrease of 6,178 square meters. It is important to highlight that certain small scale planning applications did not provide specific details or floorspace figures, and these have been excluded from the calculations above.

Table 3-2 Major extant Retail Planning Permissions in Galway City and Suburbs (Source: Galway City Council)

Applications resulting into an increase in the retail floorspace (300 sqm or above)					
Ref no.	**Address**	**Retail Category**	**Net Increase in Retail Floorspace (Approx)**	**Decision**	**Decision Date**
Reg. Ref 2047 (ABP-310568-21)	Lands to the rear of Ceannt Train Station Station Road Galway	Convenience and Comparison Retail both	18,514 sqm Convenience Retail (Small retail units) – 3,024 sqm Comparison Retail (Anchor/MSU) – 15,868 sqm *(Please note the gross retail floorspace is 26,449 sqm i.e. 22,669 sqm for convenience and 3,780 sqm for comparison retail)*	Split decision - Grant and refuse by ABP	Final Grant 28th June 2023
Reg. Ref 2460118	Glenanail, Tuam Rd Galway	Convenience and Bulky Retail both	12,920 sqm Bulky – 5,642 sqm (Retail Warehousing/Bulky Goods) and 6,969 sqm (General Warehousing) Total Bulky Retail – 12,611 sqm Convenience (Retail Local Retailing Needs) – 309 sqm	Grant Permission with conditions	Final Grant - 30th October 2024
Reg. Ref 21286	Site to rear of Block D Glenrock Business Park, Bothar na Mine - Briarhill/Ballybrit	Bulky Retail	1001 sqm	Grant Permission with conditions	Final Grant on 30th June 2022
Reg. Ref 2444	Unit B Baily Point, Upper Salthill Road, Galway	Convenience Retail	465 sqm	Grant Permission with conditions	Final Grant 05th November 2024
Reg. Ref 2181	Tonery's Pub 144 Bohermore - Galway	Comparison Retail	309 sqm	Grant Permission with conditions	Final Grant on 29th September 2024
Reg. Ref 22/259	Headford Road in the townland of Townparks, Galway	Convenience Retail	3,099 sqm	Grant Permission with conditions	Final Grant on 23rd November 2022

Applications resulting into a decrease in the retail floorspace (300 sqm or above)					
Ref no.	**Address**	**Retail Category**	**Net decrease in Retail Floorspace (Approx)**	**Decision**	**Decision Date**
Reg. Ref 2430	Units 19 & 20, Wellpark Retail and Leisure Centre, Dublin Road, Galway -	Comparison Retail	1210 sqm	Grant Permissions with conditions	Final Grant on 02nd September 2024
Reg. Ref 23174	First floor unit 7, site no 2 Briarhill - Galway	Bulky Retail	313 sqm	Grant Permissions with conditions	Final Grant on 25th September 2023
Reg. Ref 22349	29-30 Briarhill Business Park - Galway	Not specified	496 sqm	Grant Permissions with conditions	Final Grant on 29th March 2023
Reg. Ref 22263	Unit 10 Wellpark Retail Centre - Galway	Bulky Retail	390 sqm	Grant Permissions with conditions	Final Grant on 19th December 2022
Reg. Ref 21429	Block 1 Ballybrit Businness Park - Galway	Convenience retail	300 sqm	Grant Permissions with conditions	Final Grant on 21st March 2022
Reg. Ref 21163	Unit 28 Briarhill Business Park - Galway	Not specified	530 sqm	Grant Permissions with conditions	Final Grant on 10th August 2021
Reg. Ref 20186	First floor Unit 4 Terryland Retail Park- Galway	Bulky Retail	741 sqm	Grant Permissions with conditions	Final Grant on 10th July 2020
Reg. Ref 2057	Gateway Retail Park (Knocknacarra District Centre), Western Distributor Road, Knocknacarra, Galway -	Comparison Retail	2,172 sqm	Grant Permissions with conditions	Final Grant on 04th June 2020
Reg. Ref 207	Unit No 10 & 11 Tuam Rd Retail Centre - Galway	Bulky Retail	394 sqm	Grant Permissions with conditions	Final Grant on 04th June 2020
Reg. Ref 19330	Abhainn na mBradán Building, Newtownsmith, Galway	Comparison Retail	2018 sqm	Grant Permissions with conditions	Final Grant on 16th March 2020
Reg. Ref 22219	**21 Shop St, Galway**	Convenience Retail	512 sqm	Grant Permissions with conditions	Final Grant on 23rd January 2024

Table 3-3 shows a breakdown of the net increase and decrease in retail floorspace in convenience, comparison and bulky categories across Galway City and Suburbs.

Table 3-3: Net Increase and Decrease (Sq.m) Retail Floorspace in Galway City and Suburbs (Source: Galway City Planning Application Portal)

Type of Retail	Net Increase (Sq.m)	Net decrease (Sq.m)
Comparison	19,276	3,922
Convenience	3,798	812
Bulky	13,612	1,444
Total	**36,683**	**6,178**

Furthermore, in Galway City, 10 no. Change of Use [Article 10(6) of the Planning and Development Act, 2000 (as amended)] – Commercial to Residential applications have been identified for the period of 2018-2023. There were 3 no. Change of Use applications granted in 2023, and the development works commenced that same year.

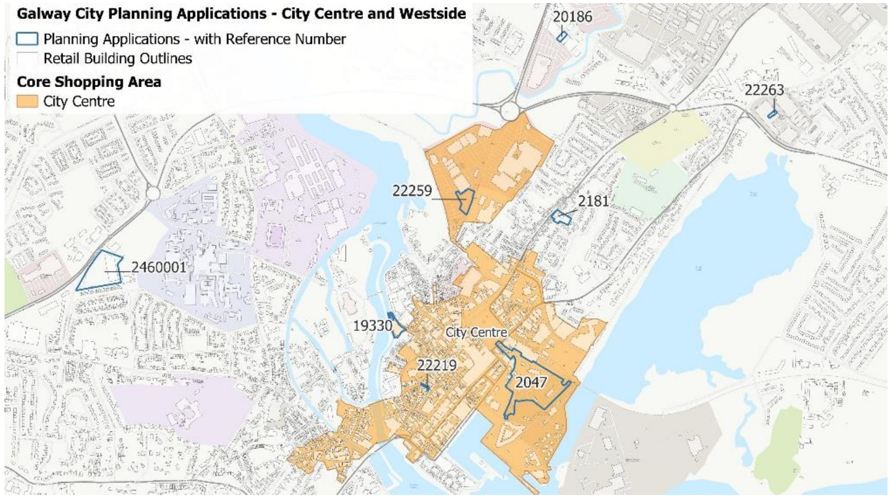


Figure 30: Extant Planning Permissions in Galway City Centre and Westside (Source: KPMG Future Analytics based on Galway City data)

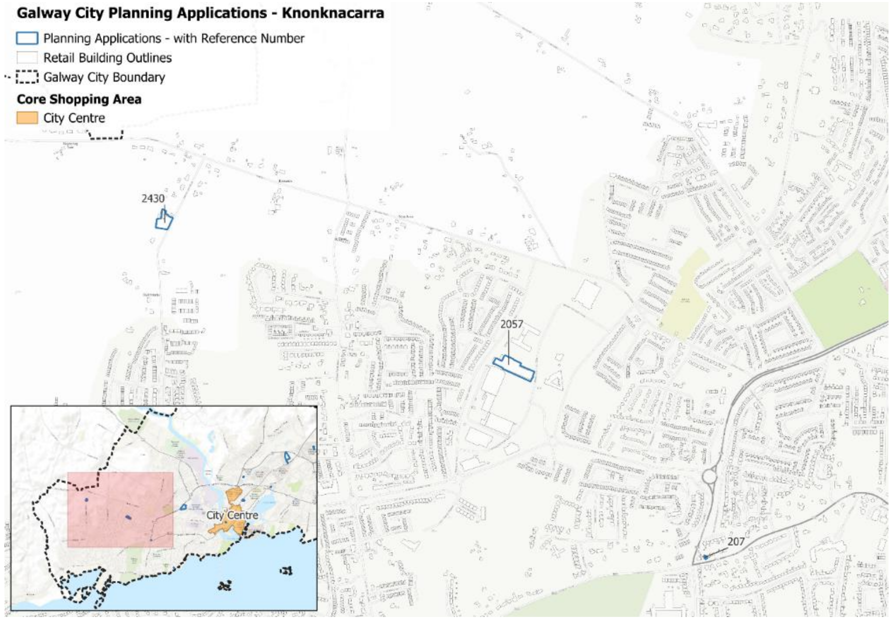


Figure 31: Extant Planning Permissions in Knocknacarra (Source: KPMG Future Analytics based on Galway City data)

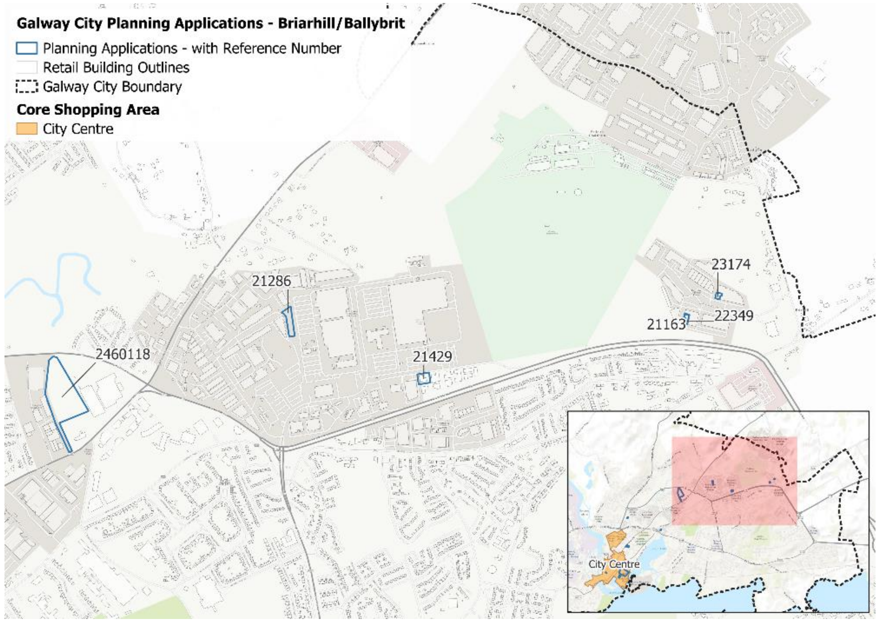


Figure 32: Extant Planning Permissions in Briarhill//Ballybrit (Source: KPMG Future Analytics based on Galway City data)

Galway County

In Galway County, 8 no. retail applications were identified, one of which is a major development includes a discount food store and ancillary development resulting in a net retail floorspace increase of 2,261 sqm in convenience category. The application (ABP Ref. 315980), located in Baile Chláir, was granted in March 2024, and recently opened. For the purposes of this assessment, we have exclusively included the applications reflecting changes in retail floorspace of 300 square meters or more, whether an increase or decrease. It should be noted that there are no net increase and decrease in retail floorspace in comparison and bulky categories noted across Galway County.

Furthermore, in Galway County, 22 no. Change of Use [Article 10(6) of the Planning and Development Act, 2000 (as amended)] – Commercial to Residential applications have been identified for the period of 2019-2024. There were 6 no. Change of Use applications granted in 2024, and the development works for 5 no. developments commenced the same year.

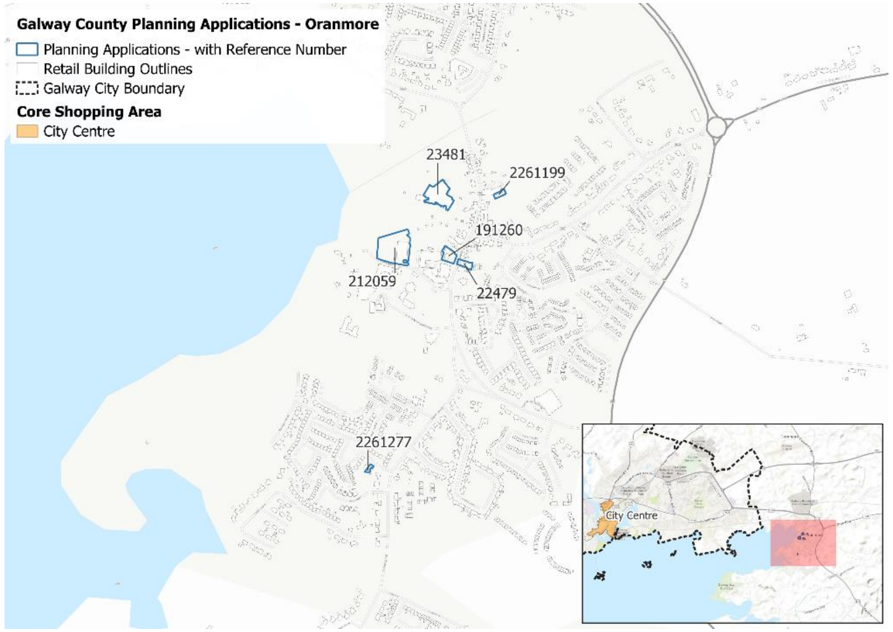


Figure 33: Extant Planning Permissions in Oranmore (Source: KPMG Future Analytics based on Galway County data)

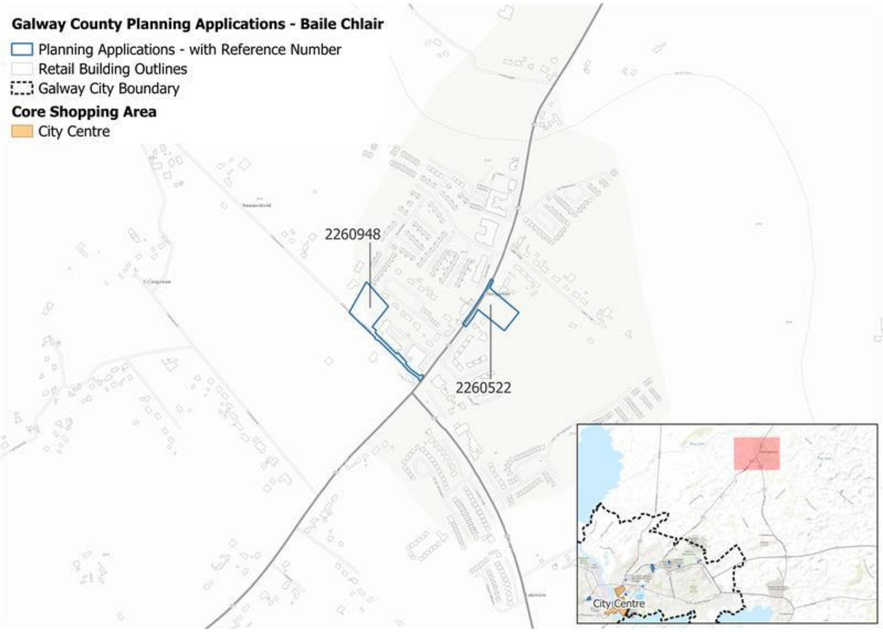


Figure 34: Extant Planning Permissions in Baile Chláir (Source: KPMG Future Analytics based on Galway County data)

Table 3-4: Major extant Retail Planning Permissions in Galway County (Source: Galway City Council)

Applications resulting into an increase in the retail floorspace (300 sqm or above)					
Ref no.	**Address**	**Retail Category**	**Net Increase in Retail Floorspace (Approx)**	**Decision**	**Decision Date**
Reg. Ref 2260522, ABP Ref. 315980	Baile Chláir	Convenience Retail	2,261 sqm	Grant permission, opened in 2025.	13th March, 2024

3.5. Mobility and Access

3.5.1. Recent developments

As the population in Galway City and County metropolitan area increased during the 1960s/70s, traffic on roads has steadily increased and car travel has become the primary mode of transport. Urban sprawl/ suburbanisation has led to the creation of segregated low-density residential estates that are often characterised by low permeability, i.e., not integrating into a wider district/ neighbourhood and inhibiting walking and cycling, which further promotes the usage of cars. At the same time, roads adjacent to district and town centres have become characterised by high traffic volumes and dominance of car parking.

Today, most visitors access city centre, district centres, and town centre locations by car; higher percentages of active modes of travel can be observed in and around Galway City Centre, which coincides with higher residential density, clusters of retail and other amenities, and a degree of pedestrianisation. Existing footpath networks in the western and eastern suburbs of Galway City as well as Oranmore, Bearna, and Baile Chláir, do not translate into relevant modal share percentages for walking and cycling. A fragmented cycle network and high car traffic volumes represent barriers for a higher usage of bicycles. The city centre serves as the transportation hub where rail transport and bus transport are connected. All district centres in the city and neighbourhood centres in the towns are served by public transport. An evaluation of these routes against similarly classified routes in Cork and Limerick as well as against NTA Minimum Performance Standards reveal significant deficits regarding punctuality, which forms a barrier for further increases in the use of public transport.

3.5.2. National and local targets

The National Planning Framework includes ten National Strategic Outcomes (NSO's) one of which is Sustainable Mobillity. These NSO's have being brought forward into the NPF First Revision. The following principles are also emphasised:

- regeneration and rejuvenation of city centres and town centres with consideration to placemaking, environmental assets and enhanced levels of amenity and design quality;
- prioritisation of walking and cycling accessibility to existing and proposed developments as safe and convenient alternatives to the car; and
- more effective traffic management and car parking to be in line with sustainable land use and design principles.

The Road Traffic Act 2024 introduced reductions to speed limits in urban areas and grants additional powers to councils to install cycling and bus priority measures.

On a local level, the Galway Transport Strategy (GTS) provides a framework for how Galway City's transport network can be redefined to address transport issues, as well as cater for the future development of the city. It examines how existing infrastructure can be best utilised and to ensure the most efficient and sustainable use of the limited available road space. A key aim of the GTS is to make it convenient and attractive walk, cycle or use public transport. The GTS also provides Galway with 'an opportunity to grow physically and economically, whilst creating the opportunity for improvement to the urban environment.'[18]

The ambitious goals and objectives set out in the transport strategy represent significant change to the way private motorised transport, public transport, and active modes of travel are prioritised, as is exemplified by the BusConnects scheme. Setting the conditions for this change is particularly important as the population in the Metropolitan Area is projected to grow

[18] Galway Transport Strategy Appendix B Modelling and Appraisal, p.4.

further, which will invariably lead to increased trip generation between locations of retail, work, education, amenities, and residences.

The modal share for 2022 points to a majority of persons using private vehicles as the primary transport option (58%), a percentage lower than for Cork, Limerick, and Waterford. 30% of persons use active modes of travel (primarily walking), the highest value among the cities, tied with Dublin, although there are significant differences between city centre and suburbs/ town centres. Use of public transport stands at 12%, significantly lower than in Dublin but higher than in the other cities.

As the city is projected to grow, there is a need to strengthen the attractiveness of the city centre and district centres, as well as the connectivity between these centres and residential areas, and between the city centre and metropolitan towns, to promote a further increase in the share of active modes of travel and public transport.

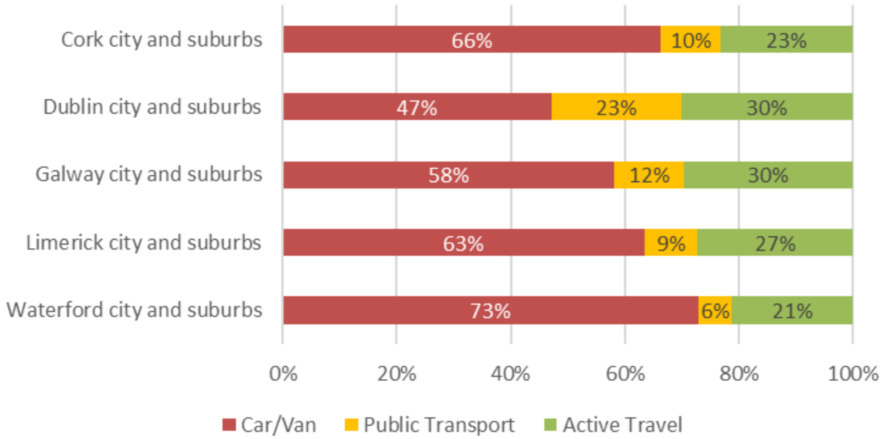


Figure 35: Modal Split Comparison of Cities and their suburbs, excluding categories ‘unknown’ and ‘other’ (Source: KPMG Future Analytics, based on CSO data)

3.5.3. Evaluation of current access to retail areas

Accessibility of the retail areas was analysed with a catchment calculation (walking, public transport, driving) for the Core Shopping Area, the three district centres Knocknacarra, Westside, Doughiska, and the three Neighbourhood Centres Oranmore, Bearna, and Baile Chláir.

The table and chart below summarise and visualise walk-time and drive-time catchments for these areas.

Table 3-5 Summary of walk-time and drive-time catchments

Centre	Catchment time	Catchment population
Walk-time catchments		
City Centre (Historic Centre)	15 min	12,800
City Centre (Headford Road)	15 min	12,300
Knocknacarra	15 min	9,500
Westside	15 min	12,500
Doughiska	15 min	4,000
Oranmore	15 min	4,800
Bearna	15 min	2,100
Baile Chláir	15 min	1,600
Drive-time catchments		
Galway City Centre	30 min	204,500
Galway City Centre	45 min	314,200
Galway City Centre	60 min	456,500
Oranmore	15 min	46,600
Bearna	15 min	32,000
Baile Chláir	15 min	29,000

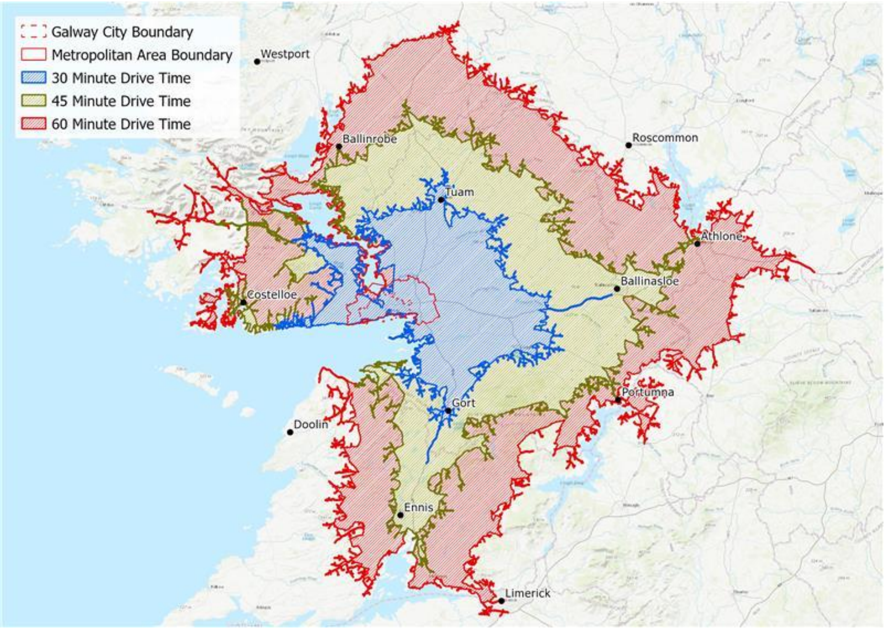


Figure 36: Drive-time Accessibility of Galway City Centre (Source: KPMG Future Analytics, based on ArcGIS Online data)

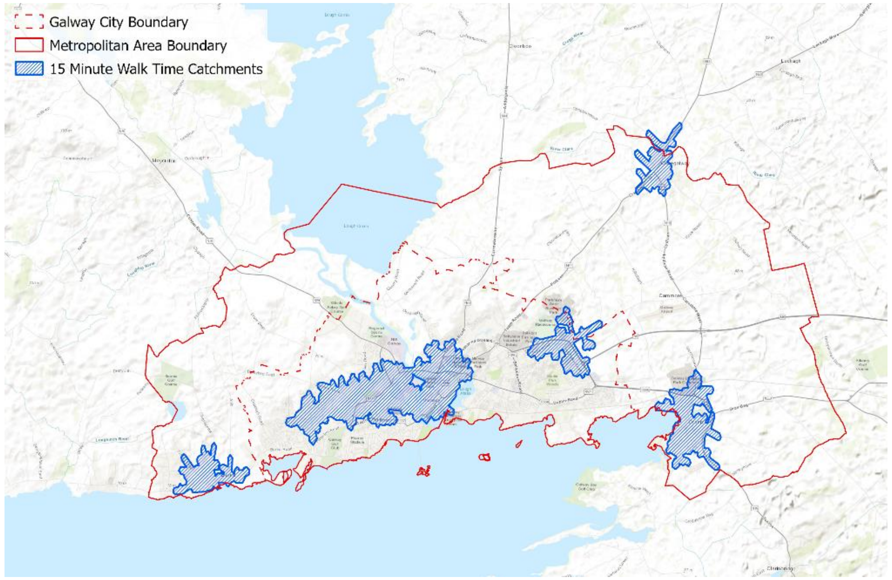


Figure 37: Walk-time Accessibility of Galway City Centre, District Centres, Neighbourhood Centres (Source: KPMG Future Analytics, based on ArcGIS Online data)

3.6. Tourism

Tourism in Galway has continued to evolve over the past decade with the delivery of urban realm and trail products, as well as support for festivals and events throughout the calendar year with the aim of extending the season beyond the traditional holiday periods.

Attraction and Visitor Numbers

According to Fáilte Ireland research the Wild Atlantic Way attracted over 8.4 million tourist visits, including 5 million domestic and 3.4 million overseas tourists in 2019 (the latest data available), generating €3.1bn in revenue for the region.

Figure 38: Visitor attraction sites in Galway MASP (Source: Fáilte Ireland)

Retention of tourism expenditure especially in the retail sector, along with the development of appropriate synergistic tourism facilities and activities will be important in the future development of the Galway MASP, the vibrancy of the retail core area and associated integrations with food and beverage offerings, leisure facilities and the wider night-time economy.

Table 3-6 Visitor attraction sites in Galway MASP 2023 (Source Fáilte Ireland)

Visitor Attractions	Total Visitors
Galway City Atlantaquaria	118.500
Galway City Museum	99,334
Hall of the Red Earl	26,000
Micil Distillery Experience	5,598

Overnight Stays

In 2023 there was 6,564,000 overseas visitors to Ireland, with key source markets being Britain (2,604,000), Mainland Europe (2,260,000), North America (1,340,000) followed by the Rest of the World (362,000). In addition, there were 1,347,000 visits from Northern Ireland. Domestic tourism is increasingly important with 14.3m domestic trips in 2023.

Overseas visitors spent 5.58bn in 2023, while visitors from Northern spent 399m, and domestic visitors 3.1bn.

Overseas visitors stayed for 52.9 million nights in 2023.

Registered Visitor Accommodation

Failte Ireland data indicates that there are 131registered and approved properties in Galway City in 2023. These properties provide 3,457 rooms or units with 9,375 bed spaces. Data is available for County Galway but is not disaggregated at MASP level. Data with regard to AirBnB is not available.

Table 3-7 Registered Visitor Accommodation in Galway City 2023 (Source Failte Ireland)

Accommodation Type	Properties	Rooms/Units	Bed Spaces
B&B	17	64	137
Caravan & Camping	1	70	220
Hostel	4	0	617
Hotel	30	3,030	7,637
Self-catering	53	53	187
Welcome Standard[19]	26	240	577
Total	**131**	**3,457**	**9,375**

Hotels are located primarily in and around Galway City centre and towards Salthill and the coastal area.

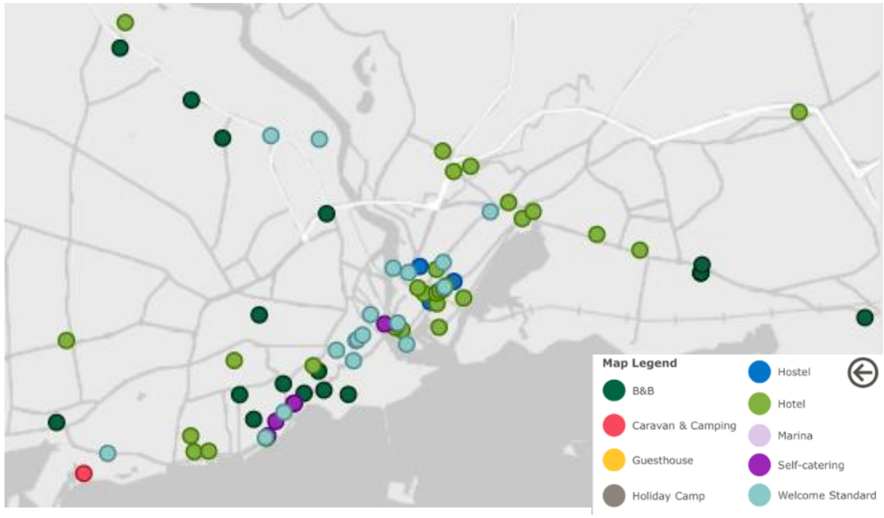


Figure 39: Distribution of registered visitor accommodation in Galway City 2023 (Source: Failte Ireland)

Summary

Tourism in Galway presents significant opportunities for the retail sector, primarily through increased footfall and sales revenue. The steady influx of visitors, especially during major events like the Galway International Arts Festival and the Galway Races, drives higher foot traffic in retail areas. This surge in visitors translates to greater spending on a variety of goods, from souvenirs and local crafts to clothing and electronics, thereby boosting sales for local businesses. Additionally, the demand for unique, locally-made products support local artisans and producers, promoting Galway's rich cultural heritage. The increased footfall also necessitates the hiring of additional staff, creating more job opportunities for residents.

Notwithstanding the above, careful consideration needs to be given to future retail development to ensure that the needs of both tourists and resident population are accommodated in the retail offering.

[19] Fáilte Ireland type of classification for tourism accommodation

3.7. Night-time economy

The night-time economy (NTE) has the potential to play a key role in the Galway Retail landscape. By fostering a vibrant and diverse range of activities after dark, Galway can enhance its appeal to both residents and visitors alike. The Joint Retail Strategy aims to explore opportunities for growth in the NTE, addressing key areas such as safety, demand, transport and variety of retail offerings. By leveraging these opportunities, Galway can create a dynamic and inclusive environment that supports local businesses and enriches the community's cultural and social fabric.

Case Study London Boroughs: In November 2022 the "*Night-Time Enterprise Zones*" (NTEZ) initiative was launched by the Mayor of London to revitalize high streets and town centres after 6pm.[20] Three boroughs—Bromley, Lambeth (Vauxhall), and Greenwich (Woolwich)—were selected to implement year-long programs to assess the impact of a thriving night-time economy. The program aimed to:

- *Extend opening hours and boost activity on the high street.*
- *Improve access to shops, activities, and services after 6pm.*
- *Make the high street more welcoming and inclusive*
- *Increase the number of night workers benefiting from good work standards.*

In total 65 businesses extended their opening hours during NTEZ "Lates" events across the three boroughs. Results found that average local spend during events increased by up to 70% from 6pm to 9pm compared to the same dates in 2022. Up to 70% of surveyed event attendees visited a local business before or after their visit. The events demonstrated the potential to more than double high street footfall between 6pm-midnight and showed the positive outcomes a thriving NTE can have on retail outlets in the city.

Case Study Nanjing: In 2017 the city of Nanjing, China announced the "*Implementation Guidance on Accelerating the Development of Night-Time Economy*", which outlined Nanjing's ambition in developing their "*Jinling at Night*" proposal. The proposal outlined strategies to boost the city's night-time economy, focusing on enhancing cultural, tourism, and commercial activities during evening hours. This pilot project took place in a small number of selected pilot zones within the city. Nanjing has since developed a well-known night-time cultural offering in the country and saw improving sales revenue from its night-time economy pilot zones reach 4% of the city's overall retail sales revenue.[21]

As seen from the above case studies, there are clear benefits to be derived from harnessing the NTE for retail in both Galway City and County. The case studies provide examples of both event and non-event centred approaches, which could be adopted in tandem with a late-night shopping experience. The Galway City Night-Time Economy Action Plan highlights the importance of supporting local businesses and outlines the crucial role the retail sector can play in enhancing vitality and vibrancy in the evening and night-time economy. The Galway County Development Plan further supports the role of the NTE in towns and villages provided it is without detriment to residential amenity and that activities delivery vitality and viability, which create a safe environment for visitors and residents alike.

Considering the proven benefits of the night-time economy for retail, as demonstrated in our case study findings, it is a recommendation of the JRS to support the objectives of the current and future Galway City Night-Time Economy Action Plan.

[20] *Nighttime Enterprise Zones Report*

[21] *Nanjing Case Study*

4. SCOT Analysis

	Socio-demographic and economic profile	Retail Business Landscape	Tourism and Night-time economy	Mobility and Access
Strengths	Fourth largest centre in Ireland with large catchment Strong MedTech, ICT and Health care sectors	Large city centre dominated by historic building structure	Proximity of numerous tourist destinations to historic city centre	Extensive parking in walking distance from all retail areas Pedestrian street network in city centre
	Safe city with purple flag award designations	Visually attractive and compact Galway City and town centres (Oranmore, Bearna)	Increasing tourist footfall over recent years	Generally good accessibility of District Centres and Neighbourhood Centres
	Young population (with net natural population increase) – particularly in County, attractive place for in migration (net migration surplus)	Good retail diversity Strong Food and Beverage offering	Vibrant Arts and Culture scene Strong festival calendar	Train station and multi-modal hub Public transport routes to city centre and town centres
	Above State average percentage in third-level education	Good Civic space for events/ gathering, outdoor tables and chairs provide vitality		Good walkability with extensive footpath network in metropolitan settlements

Challenges	Shortage in affordable housing accommodation, particularly rental market Critical infrastructure deficits	Small-scale retail store sizes in historic city centre Few high-end brand stores/ limited spending opportunity for higher income Brexit implications on trade and related business closures Decline in family businesses	Shortage of mid-price range visitor accommodation	Constrained accessibility of city centre (traffic) during peak times Inconsistent cycling infrastructure in city and towns Poor public transport priority in city and towns

	Socio-demographic and economic profile	Retail Business Landscape	Tourism and Night-time economy	Mobility and Access
Opportunities	Continuing population growth increases customer base for retail Continuing income growth increases market potentials for high-end shopping Redevelopment of city centre regeneration sites for mixed use/ residential/ retail and residential infill with help sustain the retail economy Opportunities to enhance the 15-minute city concept with scope for additional neighbourhood facilities	Expected further growth of labour force leads to larger pool of potential employees Solidifying Galway as student city may increase vibrant night-life economy Transition to carbon neutral economy Digital transformation of retail Regeneration of Ceannt Quarter will facilitate opportunities for greater retail diversity	Promotion of Galway as a year/round destination Opportunity to optimise integration of visitor attractions Addition of visitor destinations could increase tourism spend Opportunities through implementation of the Public Realm Strategy for greater use of space for markets and events	Implementation of transport strategy actions could alleviate accessibility constraints and lead to higher modal shares for public transport and active travel Regeneration-designated sites and enhancement of public realm can provide opportunity to attract more footfall to city centre Roll-out of projects such as the Cross City Link, N6 GCRR, extended city centre Pedestrianisation and extension of the cycle network will enhance accessibility for all Roll-out of Bus Connects to support greater accessibility to the City Centre and District Centres and to Metropolitan settlements Completion of the Ceannt Station upgrade will enhance intercity and commuter rail services.

	Socio-demographic and economic profile	Retail Business Landscape	Tourism and Night-time economy	Mobility and Access
Threats	Increasingly expensive housing market Vacant and underutilised housing stock / buildings impacts on city centre's attractiveness Impact of climate change	Potential shortage of labour without third-level degree Risk of sectoral decline if structural issues are not tackled (housing, transport) Shortage of qualified personnel (retail, tourism, hospitality) Continuing low-density suburbanisation may lead to doughnut effect in retail Overreliance on the tourist population	Risk that inflationary pressures may slow the development of additional visitor destinations	Continuing low-density settle-ment expansion may reduce transport infrastructure viability Failure to implement sustainable transport solutions likely to lead to worsening transport/ accessibility constraints

5. Engagement

5. Engagement

5.1. Retail Survey

From October 2024 to January 2025 a household and shopper survey with 1,400 samples was carried out as part of this strategy.

The survey contained questions relating to where the respondents carry out their main food and grocery shopping (i.e., convenience goods), top up shopping, comparison shopping (e.g., clothing and footwear) and comparison/ bulky goods (e.g., large household appliances and furniture) shopping. The surveys contained questions regarding the respondents' satisfaction with the location they were shopping in, along with the frequency of these types of shopping including online shopping. Respondents were also asked to provide feedback on factors that would make them shop more often locally.

The survey results provide insights into customer behaviours, preferences, and satisfaction levels. They further help understand customer needs and identify areas for improvement. Some of the takeaways from the survey analysis are:

- Less than half of respondents expressed satisfaction with the retail shopping experience;
- Galway City Centre was the by far most frequently visited area for shopping, socialising, and leisure activities;
- The vast majority of respondents shop online at least once a month;
- The majority of respondents never use click-and-collect services;
- Opinions on late-night shopping in Galway City Centre are mixed, with approximately half of respondents saying they would be encouraged to visit in the evening if late-night shopping was an option;
- The general reasoning behind what would motivate people to shop more often in their primary shopping location indicates a desire for more and better shops, including specific brands. Parking improvements, such as cheaper or free parking and reduced traffic congestion, were also frequently mentioned. Additionally, better public transport and infrastructure, as well as a greater variety of shops, were highlighted as important factors;
- The vast majority of respondents agreed that shopping locally is important to them, with those who agreed citing support for the local economy as their primary reason.

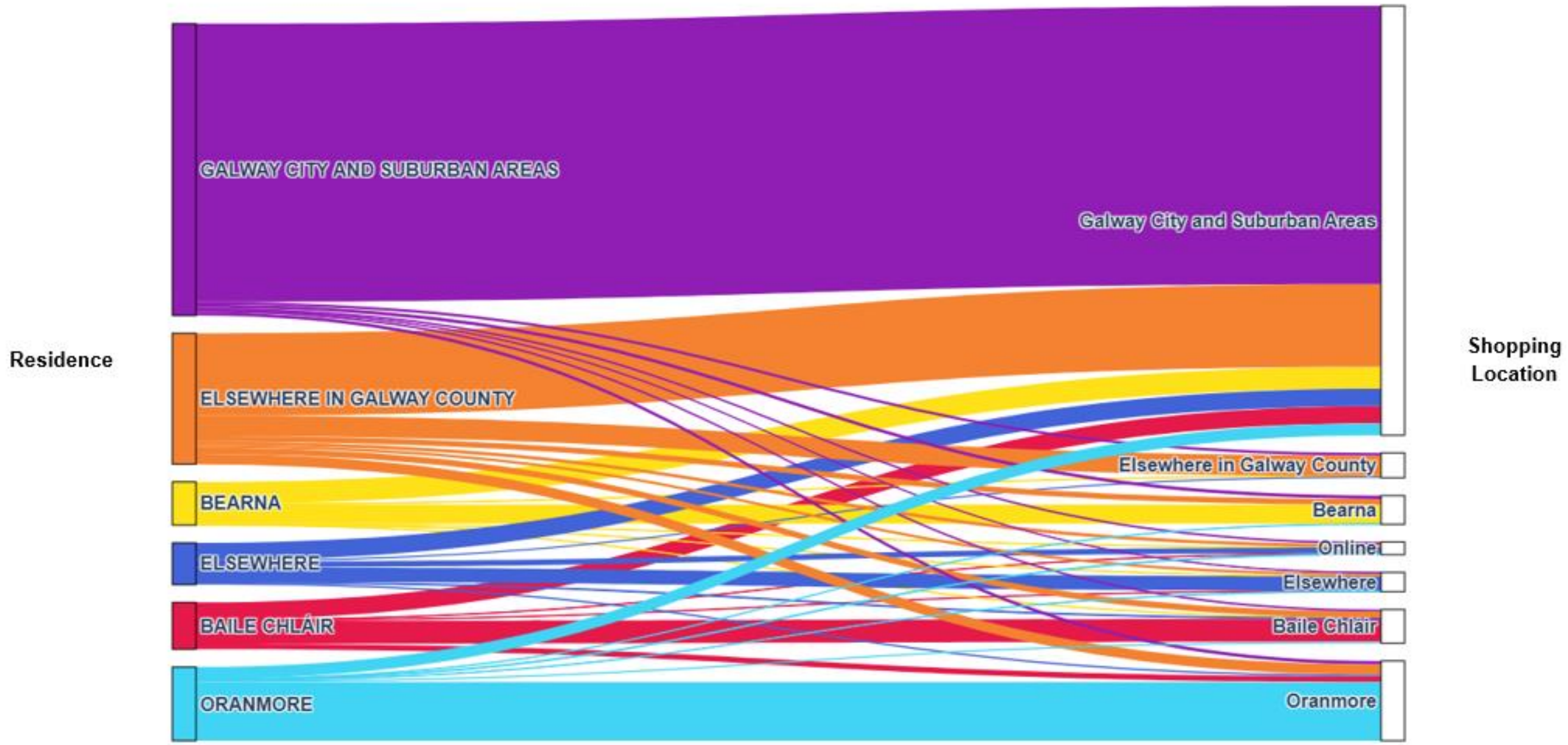
Shopping Patterns

The majority of convenience shopping occurs within Galway City and its suburban areas. This is followed by residents from elsewhere in Galway County travelling to Galway City and suburban areas. Oranmore residents predominantly shop within Oranmore, while Baile Chláir and Bearna residents show a preference for local shopping.

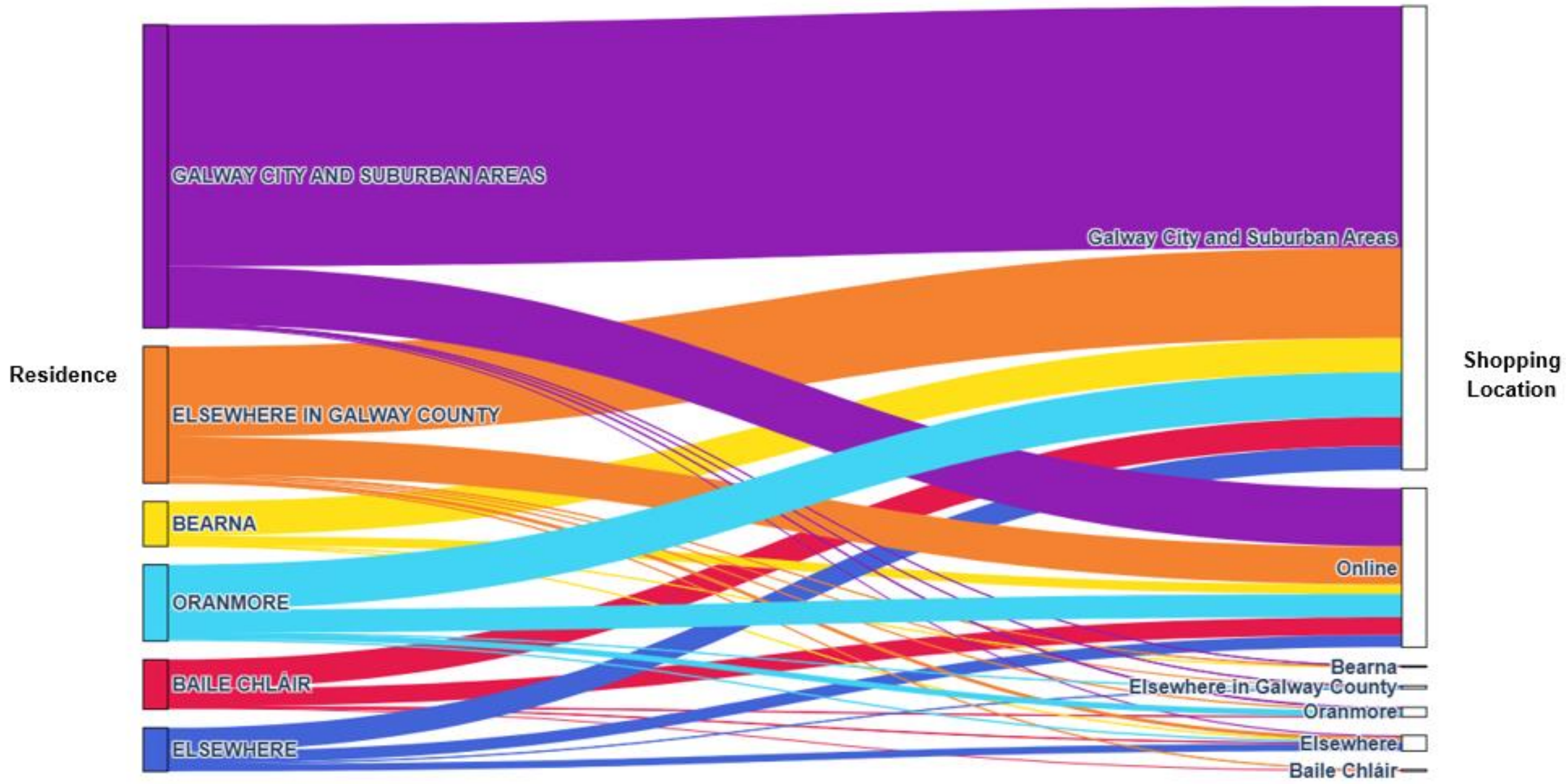
Galway City and its suburban areas remain the primary shopping destination for non-bulky goods. Additionally, shoppers from elsewhere in Galway County prefer this area. Online shopping is also significant among Galway City residents and those from elsewhere in Galway County. Oranmore residents frequently shop in Galway City and suburban areas.

For bulky goods, shopping occurs within Galway City and its suburban areas. Online shopping is notably popular among Galway City residents and those from elsewhere in Galway County. Additionally, shoppers from elsewhere in Galway County travel to Galway City and suburban areas, while Oranmore residents prefer online shopping.

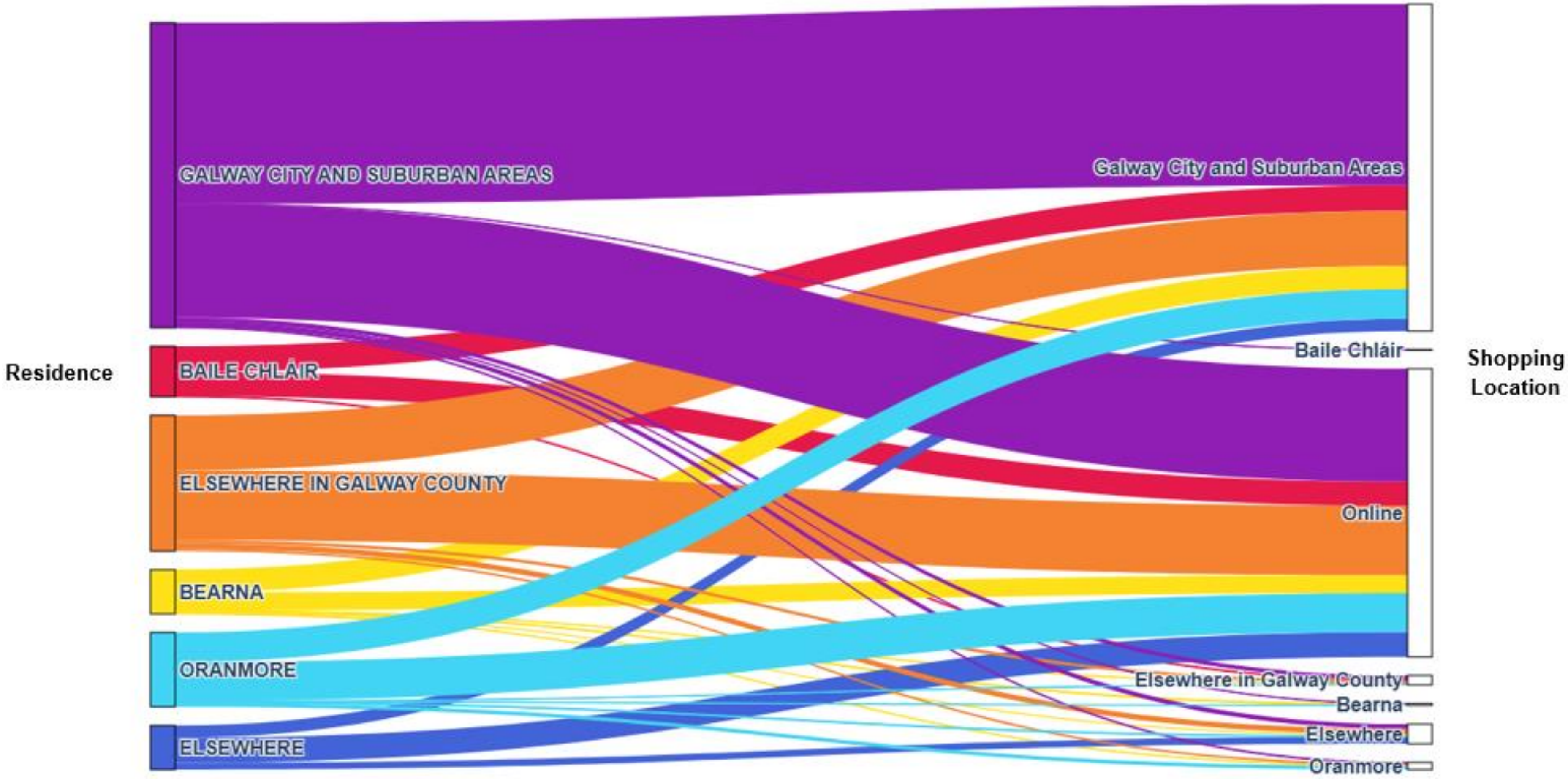
Shopping Patterns: Where People Live vs Where They Shop (Convenience goods)



Shopping Patterns: Where People Live vs Where They Shop (Comparison goods)



Shopping Patterns: Where People Live vs Where They Shop (Comparison/ Bulky goods)

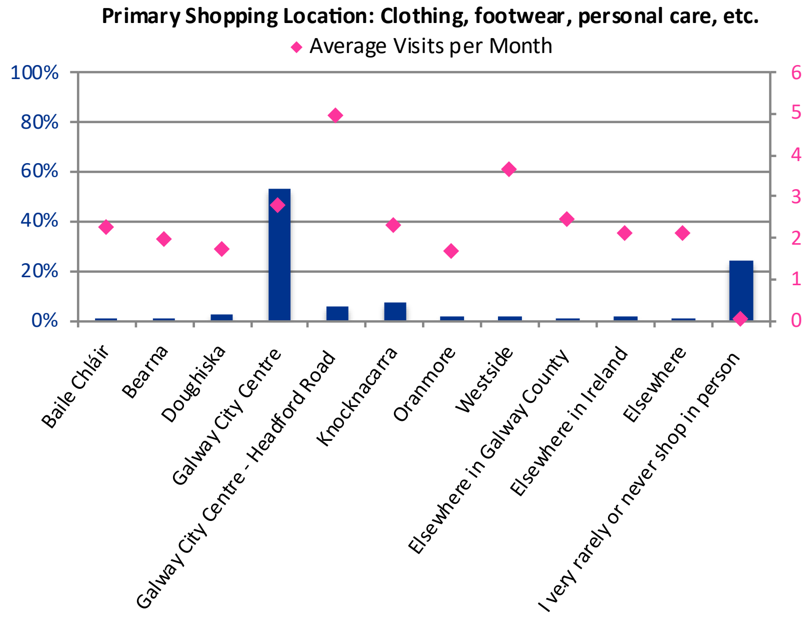


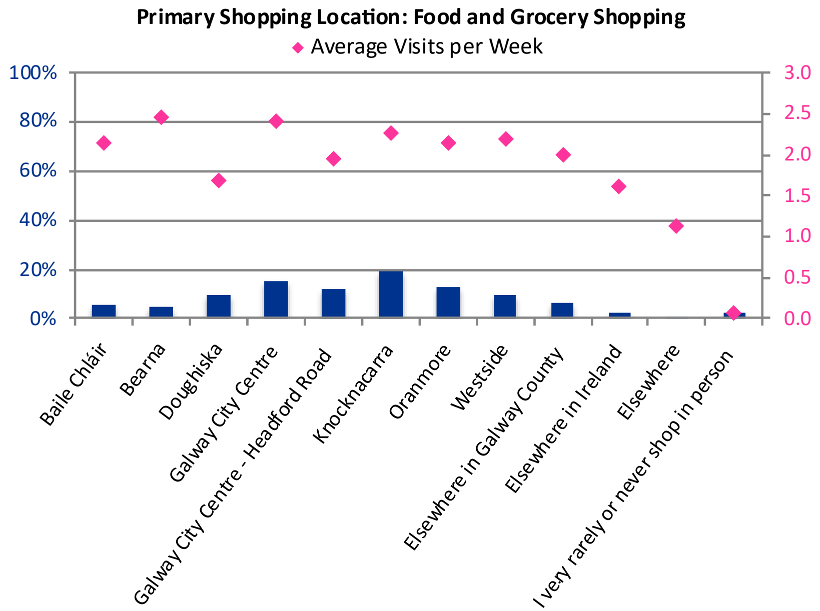
Shopping Category Analysis: Location and Frequency

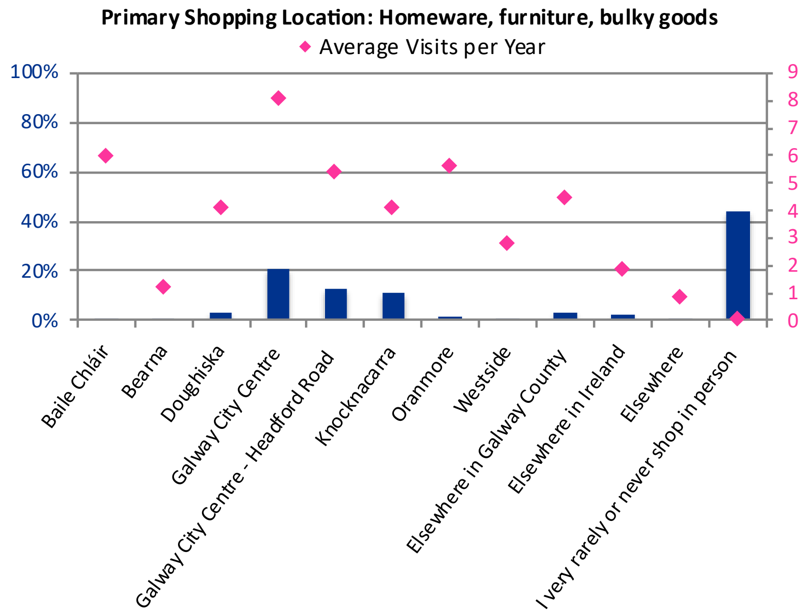
For **food and grocery shopping**, Knocknacarra is the most popular location, followed by Galway City Centre. Bearna, despite having fewer respondents, has a high visit frequency.

In the category of **comparison goods** (**clothing, footwear, personal care, health products, jewellery, and books)**, Galway City Centre is the most frequented location. The Headford Road area within Galway City Centre also sees a high visit frequency, though it is visited by fewer respondents. Westside is another notable location with a significant visit frequency.

For **homeware, furniture, and bulky goods**, Galway City Centre leads again, with the Headford Road area showing a significant visit frequency. Knocknacarra also has a notable percentage of respondents.





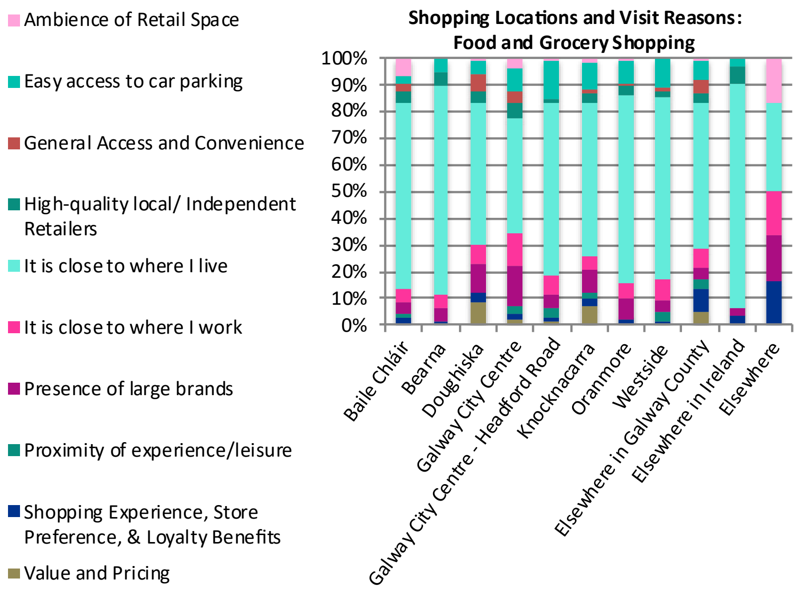


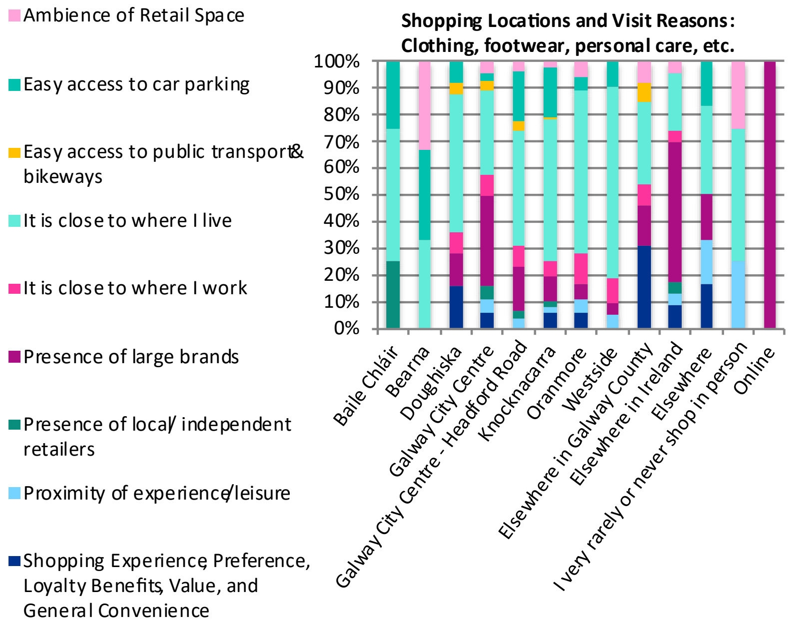
Shopping Category Analysis: Reasons for Visiting

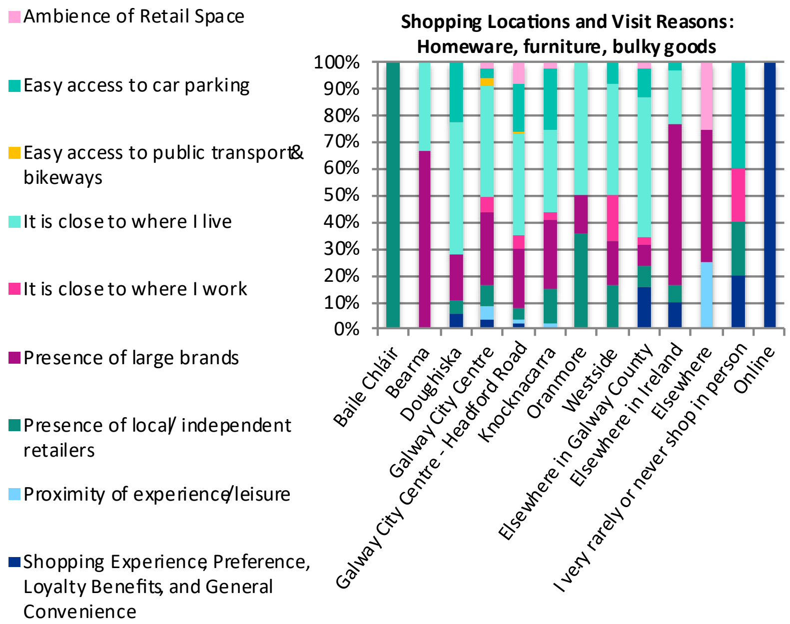
For **food and grocery shopping**, proximity to home is key, especially in Baile Chláir and Bearna. Easy parking is significant in Galway City Centre - Headford Road and Knocknacarra. Large brands influence shopping in Doughiska and Galway City Centre.

For **clothing, footwear, personal care, health products, jewellery, and books**, proximity to home is dominant, particularly in Knocknacarra and Oranmore. Large brands are crucial in Galway City Centre and Doughiska. Easy parking is important in Baile Chláir and Galway City Centre - Headford Road.

For **homeware, furniture, and bulky goods**, proximity to home is significant, especially in Baile Chláir and Elsewhere in Galway County. Large brands play a role in Bearna and Galway City Centre. Easy parking is important in Knocknacarra and Galway City Centre - Headford Road.

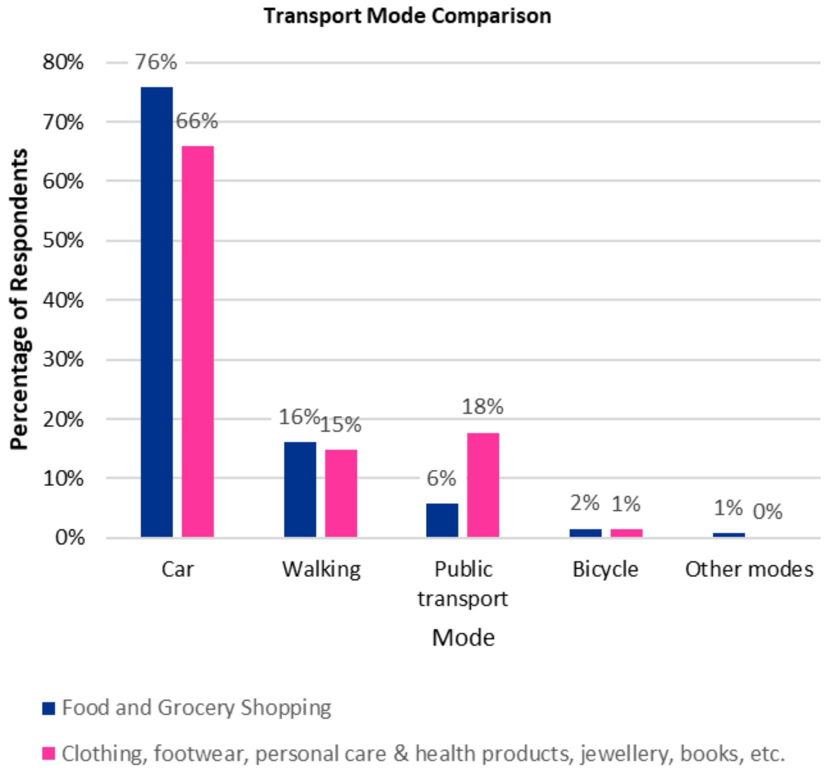






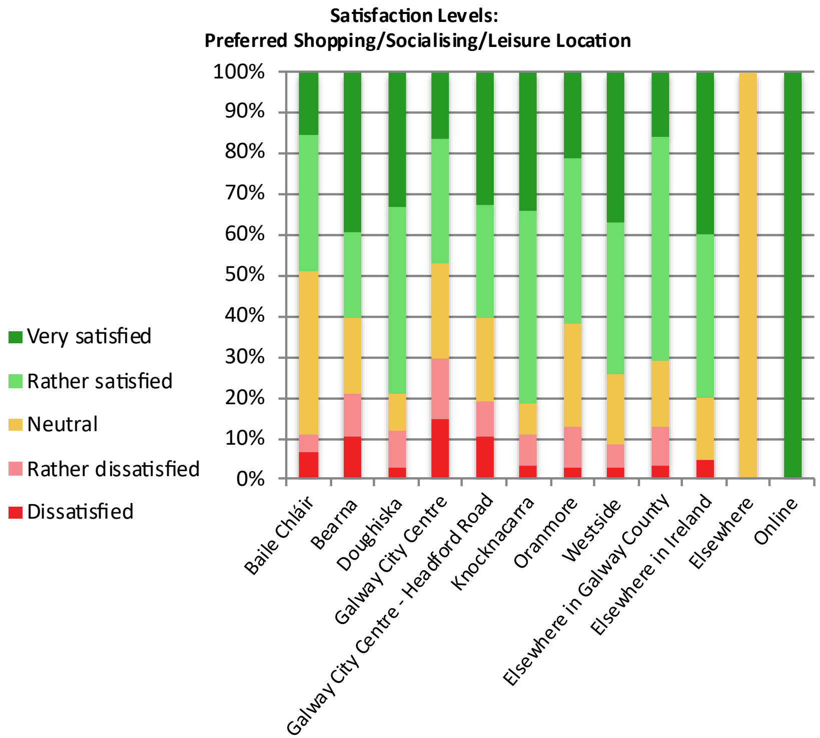
Shopping Category Analysis: Transport Modes

People are more likely to drive for **food and grocery shopping** than for **clothing and other products**, likely due to the need to transport heavier items. Walking is slightly more common for food shopping, suggesting convenience for nearby grocery stores. Public transport is used more for clothing and other products, possibly because these stores are often in city centres or shopping centres. Cycling is not popular for shopping, likely due to the inconvenience of carrying bags. Other modes of transport are the least common for both types of shopping.



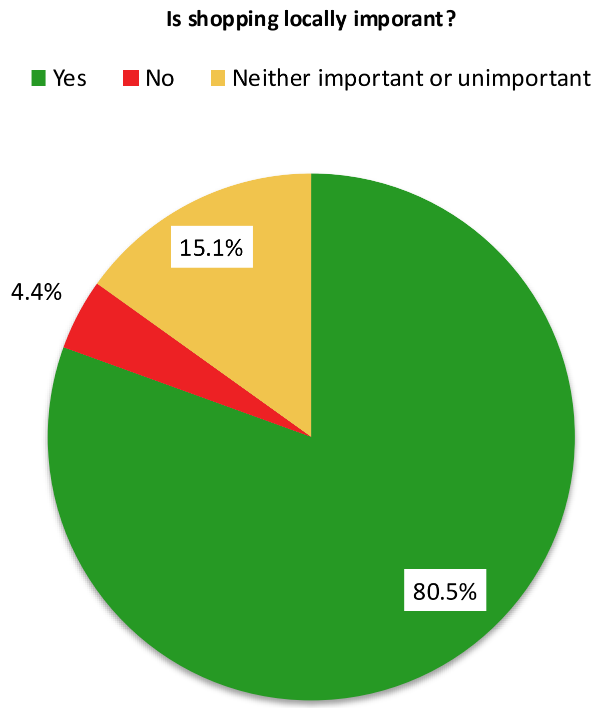
Shopping, Socialising, and Leisure Satisfaction

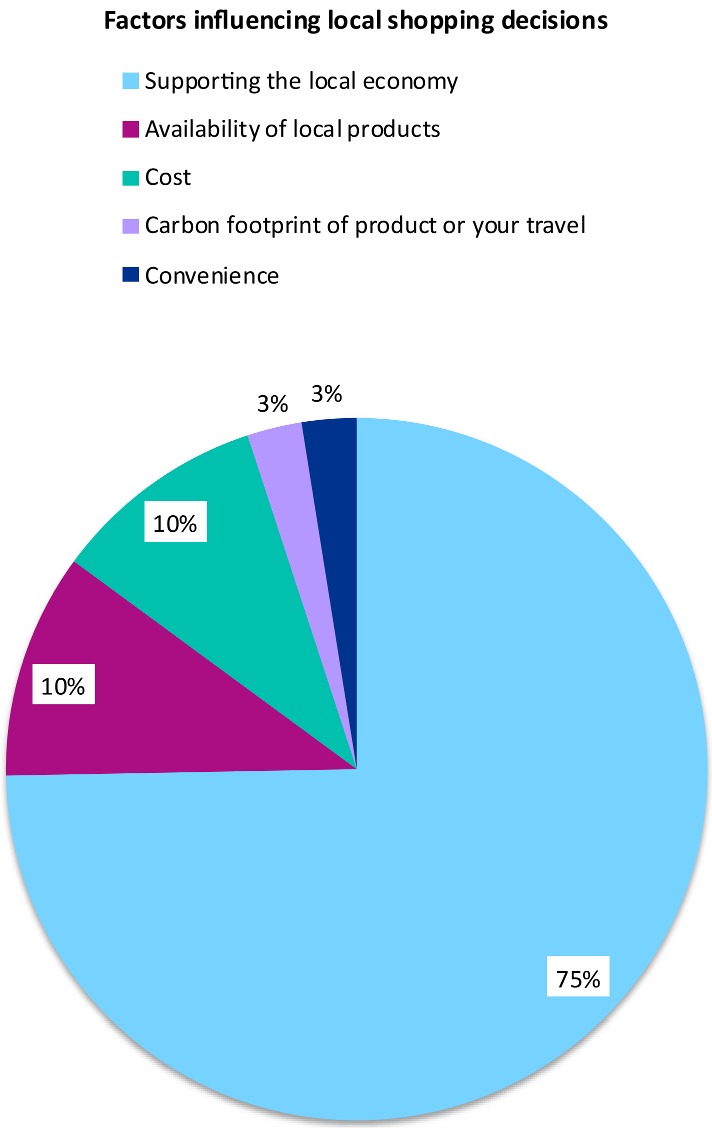
The analysis of satisfaction levels across various locations reveals notable differences. Bearna and elsewhere in Ireland have the highest satisfaction, while Doughiska and Knocknacarra also show high satisfaction. Elsewhere in Galway County has balanced satisfaction, and Galway City Centre - Headford Road has moderate satisfaction. Oranmore and Westside show good satisfaction levels. Baile Chláir has lower satisfaction, with many feeling neutral. Elsewhere has no very satisfied visitors, with all feeling neutral. Galway City Centre exuded a mixed response but did have a higher level of dissatisfaction, indicating a need for improvement.



Local Shopping

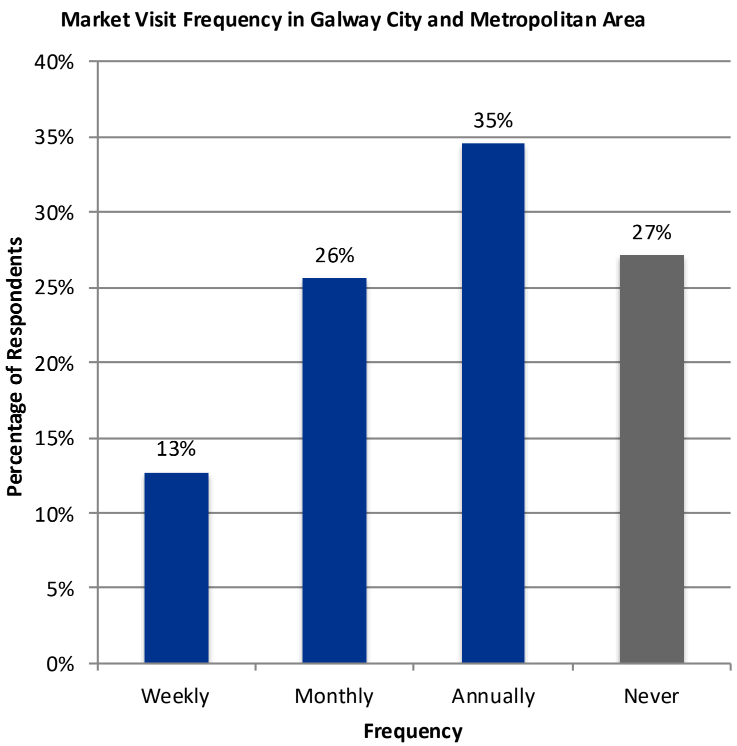
The majority of respondents find shopping locally important. Shopping locally is vital for creating a sustainable and vibrant community. Most respondents value local shopping, primarily to support the local economy. The availability of local products and cost considerations are also significant factors. Environmental concerns and convenience influence local shopping decisions to a lesser extent. These insights highlight the importance of supporting the local economy, availability of local products, cost considerations, environmental impact, and convenience in promoting local shopping.

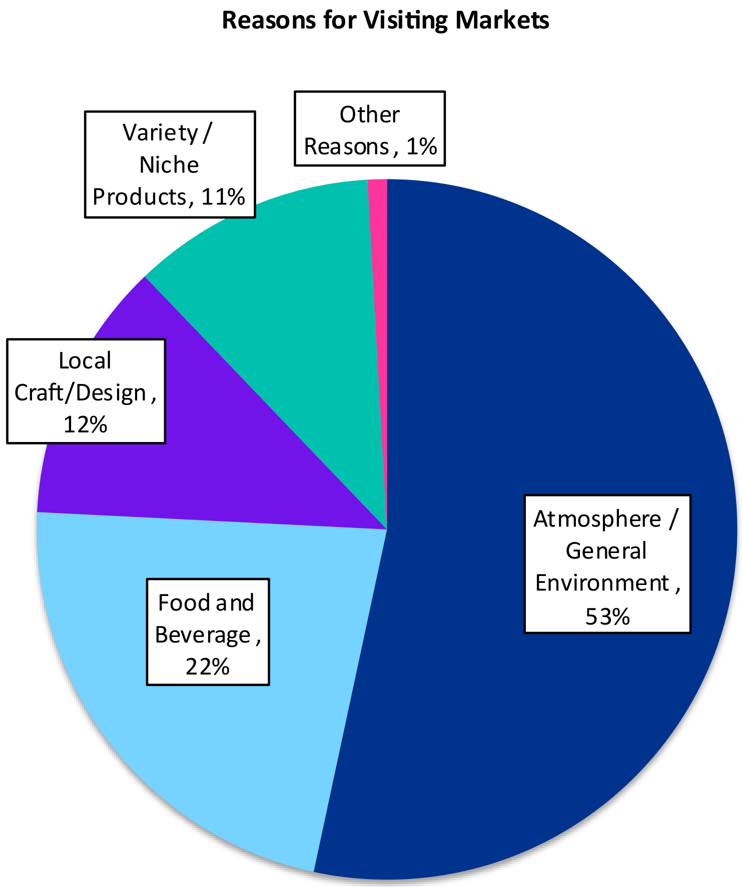




Markets

Market visit frequency varies among individuals, with some visiting weekly, monthly, annually, or never. The primary reasons for visiting markets are diverse. Many are attracted by the atmosphere and environment, while food and beverage offerings have significant appeal. Local craft and design interest some market-goers, reflecting a preference for handmade and locally produced items. Others are drawn by the variety and niche products, highlighting the importance of unique and diverse offerings. These insights suggest markets are social and cultural hubs offering a rich and varied experience.





Summary

These findings underscore the need for improved retail experiences and enhanced public transport to encourage local shopping and address areas of dissatisfaction. In particular, the survey responses point to the need for action to enhance the position of Tier 1 Galway City Centre as a retail destination for both convenience and comparison/non-bulky shopping. As the responses show, visitors value attributes of a retail destination that go beyond a retail offer only but prefer an integrated experience of large brands, sustainable alternatives/ independent shops, public amenities, arts and cultural offer and other attractions.

5.2. Stakeholder Interviews: Strategic Conversations

During the course of the preparation of the Joint Retail Strategy a series of meetings and workshops took place with relevant stakeholders and interest groups with the aim of establishing first hand, on the ground experience of the challenges within the retail environment in Galway. It was the intention of these conversations to be solution orientated and so it was important to discuss suggested recommendations from the various stakeholders as to how they feel their concerns could be resolved. 17 workshops have taken place with relevant organisations including key council departments, business supports groups, retail businesses, elected members and representative groups as set out in Table 5-1 below.

Table 5-1 List of stakeholders interviewed

	Organisation
1	Údarás na Gaeltachta
2	Northern and Western Regional Assembly
3	Elected Members Galway City and Galway County Council (Workshop)
4	Director of Services for Urban Development Galway City Council and Director of Services for Planning, Galway County Council
5	Economic Development Galway City Council
6	Local Enterprise Office, Galway County Council
7	Galway City Council Night Time Economy Advisor
8	Galway Chamber of Commerce
9	RG Data
10	Retail Excellence
11	Convenience Retailers
12	Galway Chamber retail members meeting 1
13	Galway Chamber retail members meeting 2
14	Galway Retail Watch retailer meeting
15	St. Nicolas's Market Rep.
16	Milestone Inventive (Christmas Market)
17	Elected Members Meeting 2

The views of the Stakeholders have been thematically grouped and presented below for ease of reference.

The Joint Retail Strategy

There has been overwhelming support from key stakeholders for the development of the JRS and the potential impact that it can have on the retail environment within the City and MASP Area. Stakeholders feel that Galway presents a great opportunity for retail development and has the potential to provide the platform where the retail and hospitality sectors can create a synergy that will enhance the vitality and vibrancy of the area. Whilst there are challenges to overcome, the overarching sentiment from key stakeholders is that with the delivery of the key recommendations outlined in the Strategy, the City and MASP Area can prosper and take advantage of the opportunities that the area presents.

Overall Shopping Experience

The variety and strength of the F&B offering within the City Centre provides an opportunity for the retail sector to harness the footfall created by the experiential draw of the City Centre. However, Galway City is not perceived to have a gravitational pull as a **shopping destination** and appears to be constrained by accessibility issues, poor connectivity, lack of available residential accommodation and a lack of diversity in the retail offering. Competing towns such as Athlone and Limerick, are **perceived** as providing a better retail experience relative to their size and being able to take advantage of their respective catchment areas. In contrast, Galway, and in particular the city centre area, is perceived to be overly reliant on the tourist population which has not translated into any significant improvement of the retail offering in the city. Stakeholders state that Galway's main deficiencies relate to an over reliance on the private car which has resulted in a proliferation of surface car parking which represents an inefficient use of serviced land potentially acting as an inhibitor to developing residential accommodation in the city centre and achieving compact urban growth. The absence of retail choice in the city centre is also deemed as problematic, particularly when compared to Athlone. Increased operational costs to businesses including high commercial rates and rents in the city centre are also impacting retailers (particularly smaller, local retailers) and considered to be playing a factor in increased vacancy in the city and metropolitan area. Stakeholders wish to see Galway further capitalising on its appeal as an experiential destination which would attract additional footfall into the city that would help support and enhance the retail environment. Improvements to the public realm and the implementation of external seating to encourage increased dwell time would also contribute to improving the overall shopping experience of the area.

Transportation and Accessibility

There is a general consensus among all stakeholders that traffic congestion, car parking, poor public transport offering, and accessibility are the key issues that are negatively impacting Galway city centre as a retail destination. A number of stakeholders reference large queue times entering and exiting the existing multi-storey car parks in the city centre at peak periods which is leading to them being underutilised and resulting in an over-reliance on surface car parking. The existing bus network is considered inadequate by a number of the stakeholders which is again giving rise to an over reliance on the private car thus increasing traffic congestion which is adversely impacting the ease at which the public can access the city centre. The proliferation of surface car parking at Headford Road was singled out as being particularly problematic due to associated traffic congestion and a perceived inefficient use of land. Balancing competing interests between retailers' desire for convenient car parking with the need to improve overall accessibility and reduce traffic congestion was highlighted as being a key challenge to overcome that would, if achieved, improve the overall retail environment of the key retail areas in the City and County Metropolitan area. The fragmented location of the District Centres and the various quarters within the City Centre and the lack of connectivity between them was also flagged as a factor that is affecting Galway's retail environment. The poor condition of footpaths within the City Centre was also deemed to be contributing to the public's perception that the City Centre is not accessible, particularly for those with mobility issues and people with buggies. The lack of dedicated cycle paths and routes was also mentioned during the consultation process as being an issue that is inhibiting a shift to more sustainable transport modes across the City and County Metropolitan area.

Retail Choice and Offering

The majority of stakeholders highlighted the poor retail offering in the City and Metropolitan Area as being a factor that is negatively impacting the overall retail environment in the City and County Metropolitan area, particularly when assessed against competing areas such as Athlone and Limerick. There is a general consensus that there is an excessive amount of eCig/Vape and phone shops in the city centre and a lack of international retailers and brands such as Zara, H&M etc. Comparison retailers such as Next and New Look (who have now exited the Irish market) locating in District Centres was identified as acting as a 'pull' from the retail core of the City Centre. The inflexibility of planning regulations and a perceived unwillingness to adapt existing buildings to meet the needs of modern retailers who require larger floorplates was highlighted as a reason as to why these retailers locate in District Centres. The dichotomy between the loss of convenience retail in the City Centre and the accumulation of same in the District Centres was also identified as a challenge that needs to be overcome to enhance the retail choice on offer across the various areas of Galway. Some of the stakeholders felt that the retail offering in the City Centre was primarily targeted towards tourists which was resulting in a particular type of retail product being sold and diminishing the variety and choice for the wider market.

Mix of Uses

A number of stakeholders noted that the City Centre in particular is lacking in terms of the mixture of uses that are on offer, particularly referencing the need for significant additional city centre living. They considered that this lack of accommodation is resulting in reduced footfall in the City Centre and was highlighted as being directly attributable to rising levels of commercial vacancy. The lack of accommodation was also identified as being an inhibitor to staff recruitment and enabling businesses to trade later. The lack of family friendly uses, particularly in shopping centres, and playgrounds was also mentioned as playing a role in adversely affecting Galway's retail environment.

Economic Factors

A variety of economic factors were also identified as contributing to rising levels of commercial vacancy and impacting the overall retail environment of the City and Metropolitan Areas of Galway. A number of stakeholders specifically referenced high commercial rates and City Centre rents as detracting retailers from the City Centre, particularly smaller, independent retailers and businesses. The ever-increasing operating costs for businesses coupled with a lack of central Government funding was also attributed to the reluctance of retailers from setting up a physical presence in the area. The lack of awareness around the availability of certain financial aids including energy efficiency grants was also deemed to be an issue. Targeted fiscal incentives aimed at smaller, localised retailers were identified as providing necessary supports that would encourage such businesses to develop a physical presence in the City and Metropolitan Areas.

Night-time economy

The hospitality sector, predominantly supported by tourists and students particularly in the City Centre along Shop Street and surrounding area, was identified by many stakeholders as the heartbeat of the night-time economy in Galway. An unwillingness by staff to work late, security and a lack of demand were referenced as attributable factors as to why so few retailers trade after 6pm. The impact of working from home, particularly on Fridays is deemed to be influencing demand for late night shopping which in turn is leading to a lack of appetite amongst retailers to open late. The lack of cafes and non alcoholic venues that open late was identified as a missed opportunity to increase evening footfall and boost Galway's night-time economy.

Changing face of retail and reasons for vacancy

A number of stakeholders noted that the trend to online shopping, Brexit, the uncertainty around the viability of department stores, as well as the Covid-19-pandemic have had lasting impacts on retail in Galway, with increased visible vacancy being the result in the city centre. Changing consumer patterns and in particular greater use of online shopping were deemed to be changing how shops would and should function. It was considered that there is an opportunity to reimagine retail premises as showrooms where people could view products as part of a greater experience with other complementary uses and still purchase locally but online. Despite Galway's growth and appeal to tourists and students, vacancy rates remain high. While small floor-size and limited opportunities to repurpose historical buildings are noted as reasons by some stakeholders, most stakeholders point at a general lack of people living in the city centre, constrained access, poor public transport network, disproportionally high commercial rates and rents and bland retail offering are severely impacting the retail health of the City and Metropolitan Area. At the same time, the constraints put in place by macro conditions are thought to provide an opportunity as they could give impetus to a reorientation towards incentivising small-scale independent retailers and prioritising residential and mixed use development in the city centre that could help create a critical mass to support additional retail that could help reverse current trends of rising commercial vacancy.

Atmosphere and streetscape

A number of stakeholders observed the poor condition of certain areas in the City and a lack of public realm and outdoor seating as being issues that were limiting the amount of time that people would spend in Galway's retail areas. Whilst the inclement weather was highlighted as being an issue, albeit acknowledged as something that cannot be controlled, the lack of canopy or awning type structures in the retail core to compensate for this was deemed problematic. The lack of visible Garda presence was also noted as contributing to increased shop lifting and a general perception of certain areas being unsafe. Most stakeholders highlighted the benefits that improving the attractiveness of public space including shop fronts and additional playgrounds would bring to the area. The playground near the University was highlighted as a positive example. The Markets and events were identified as positive additions that are improving the City's experiential attraction but the cost of renting a stall at the Christmas Markets and the application process to do so was also flagged as an issue that should be addressed. Some stakeholders also mentioned that the markets are constrained by their physical environment and the insufficient infrastructure that serves them which has limited their ability to grow and extend which is deemed a lost opportunity.

Council Led Management and Marketing Campaign

Galway City and County Councils are expected by the vast majority of stakeholders to assume a more active role in providing business supports and improving and managing public space and public services, particularly in the Core Retail Areas.

Specifically, retailers and business representatives call for a dedicated Management Group that would bring all key stakeholders together and drive meaningful change to help support existing retailers and attract new business to the City Centre. This approach was considered as having the potential to achieve the shared ambition of revitalising Galway's retail environment and reducing rising vacancy levels. Consistent engagement between the Local Authorities and key stakeholders to deliver a marketing campaign to highlight the benefits of Galway as a retail destination together with the prioritisation of investment in necessary infrastructure and city centre improvement works was also highlighted as being a necessary objective of the Strategy. Consideration of a Business Improvement District designation led and supported by the Authorities would also be welcomed by the retailers.

Opportunities from Residential Development

There is a strong and overwhelming consensus among the stakeholders that the City Centre is suffering as a result of a lack of available residential accommodation. The vast majority of stakeholders identified the opportunity that repurposing existing buildings, particularly at upper floor levels, could present as a means of revitalising the city core. It was mentioned that getting people to live in the city would create a heartbeat that is presently missing leading to an energetic environment that would entice more people back into the city. The added benefits of a sense of security and greater availability of staff that people living in the city would bring were also mentioned.

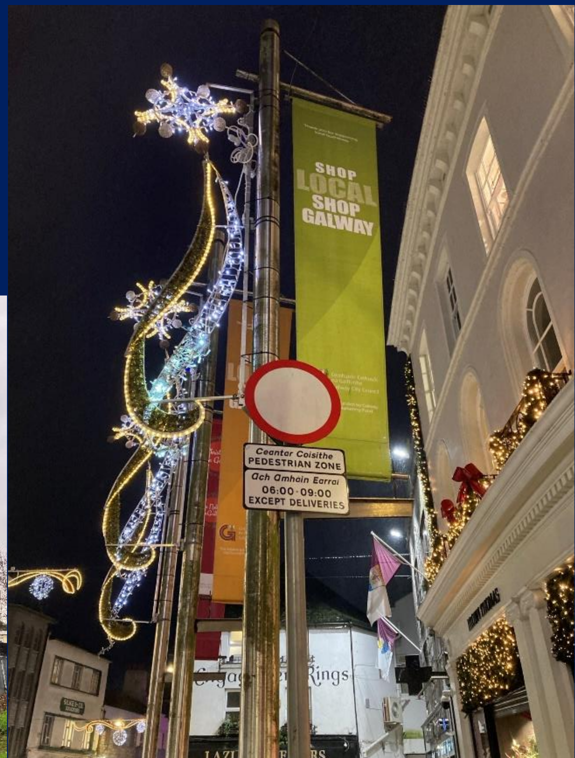
Opportunities from Markets and Events

A number of Stakeholders highlighted the benefits that the Galway Races and certain Arts Festivals bring to the area but raised concerns regarding certain adhoc events that were deemed to be 'gimmicks' that ultimately risk detracting from the vibrancy of the area. The Markets were identified as being positive additions to the City but issues regarding the condition and visual amenity of certain stalls were highlighted as concerns. Greater support by the Local Authorities and the implementation of improvement works schemes for the markets which could include the installation of temporary but attractive covers, a redesign of the layout of the markets etc were highlighted as opportunities to further enhance their appeal. A number of stakeholders identified the potential of implementing a version of Cork's 'English Market' or some form of indoor market as presenting a tangible opportunity to attract additional footfall into the city. It was also mentioned that such an initiative could act as a useful market entry point for indigenous food retailers and would encourage craft makers and food producers to locate in the City Centre.

Opportunities from Future Light Rail System and Great Public Transport Networks

The greatest challenge that needs to be overcome that was shared by all stakeholders relates to the accessibility of the City Centre. As outlined above, Galway City is severely constrained by an over reliance on the car as a result of a poor public transport network. It was considered that the implementation of a Light-Rail System to serve the city and provide greater connectivity to the edge of centre locations would positively impact the functionality of the City Centre in particular. The extension of the Tuam Rail Line was also highlighted as being an opportunity that should be explored to alleviate existing traffic congestion on the Tuam Road. Future BusConnects Schemes together with greater pedestrian linkages to existing bus stops, increased cycle parking and the rollout of bus shelters were all identified as playing a collective roll in encourage a modal shift to more sustainable transport modes. A number of stakeholders also suggested implementing Park and Ride facilities at strategic locations where there are existing pressures on the road network. Continuous and detailed engagement with the NTA & TII will be required.

6. Retail Health Checks



6. Retail Health Checks

6.1. Overview

This Chapter provides a detailed retail health check assessment for Galway City, the three Level 3 District Centres Knocknacarra, Westside, Doughiska, and the three Small Town Centres Oranmore, Bearna, Baile Chláir contained in the retail hierarchy for the Galway Metropolitan Area.

The health check assessments are based on the indicators prescribed in Annex 2 of the Retail Planning Guidelines (2012). Health checks provide useful insights into the vitality and viability of retail centres with a specific focus on retail performance and potential. It should be noted that the health check assessments represent a 'snapshot in time' since retail centres are dynamic entities. Each of the health check indicators contain a number of criteria against which the retail areas are evaluated and rated against.

Health Check Indicators:

- Diversity of uses
- Retailer representation and competitiveness
- Commercial vacancy levels
- Accessibility
- Environmental quality
- Public realm
- Perception of safety and occurrence of crime
- Shopping rents and commercial yields
- Customer views and behaviour
- Pedestrian flows.

The majority of the criteria have been informed by the Guidelines, additional criteria have been added to account for strategic goals that are included in core strategies, focusing particularly on sustainability (e.g., increasing actives modes and public transport, increasing the use of renewable energy).

6.2. Galway City Centre - Level 1 Metropolitan Centre

Historic City Centre

The extents of Galway City Centre as Level 1 primary shopping area (Metropolitan Centre) have been outlined in chapter 3.1.1 (Localised Retailing Landscape). The 15-minute walk-time catchment for the Historic Centre has been identified as covering a population of approximately 13,300 persons (see chapter 3.5.3), which represents 16% of the population of Galway City.

Pedestrian flows and the offer of non-retail use (particularly gastronomy) were rated as largely positive, although connectivity between various parts of the city centre could be enhanced. In particular, there is a disconnect between the city centre and the Headford Road area in terms of accessibility noting that the Headford Road area provides a different experience and function to the city centre. A coherent approach to edge of city centre car parking management and clear pathways into the city centre through implementation of the GTS will support improvements in accessibility. The historic city centre suffers from limited convenience retail, while the amount of comparison retail does not match the requirements for a Level 1 centre. Environmental quality and public realm outside the main civic spaces and streets, vacancy levels and perception of safety are also identified as matters requiring improvement.

There are significant opportunities for the development of key regeneration and infill sites in the city centre for mixed-use development including retail and residential uses. Ceannt Quarter in particular has the advantage of a significant approved development for retail/ residential/ office and leisure uses which will extend seamlessly into the city centre and be complemented by the Ceannt train station upgrade with additional capacity for intercity and commuter services and an enhanced multi-modal interchange. Significant potential exists at the inner harbour.

Headford Road

The extents of Galway City Centre as Level 1 primary shopping area (Metropolitan Centre) have been outlined in chapter 3.1.1 (Localised

Retailing Landscape). The area consists of Galway Shopping Centre and The Plaza to the east of Headford Road and Galway Retail Park to the west of Headford Road. The 15-minute walk-time catchment for the Headford Road Centre has been identified as covering a population of approximately 13,000 persons (see chapter 3.5.3), which represents 15% of the population of Galway City.

The overall state of retail of the Headford Road part of the Level 1 Metropolitan Centre was considered reasonable, with particularly the retailer representation in the area standing out. Headford Road complements the limited convenience and comparison offer in the historic city by a number of shops with large floorplates. Despite their close spatial proximity, Headford Road and historic city centre are perceived as two distinct areas due to the absence of attractive walkways and the dominance of vehicular traffic. Accessibility is generally rated as problematic, with congestion at peak times in particular along Headford Road. Both sides of the Headford Road are disconnected from each other and access is constrained. Further deficiencies were identified with regard to diversity of uses, environmental quality, vacancy levels. Significant potential lies in the redevelopment of this entire area for mixed use development of scale delivering a commercial and residential city centre district.

6.3. Level 3 District Centres

Knocknacarra

Knocknacarra is located approximately 4 km west of Galway city centre This area has experienced major growth in population in recent years with the lower density development in knocknacarra complemented by newer higher density communities along the Western Distributer Road, the Ballymoneen Road, Clybaun Road and the Letteragh Road. The 15-minute walk-time catchment has been identified as covering a population of approximately 9,500 persons (see chapter 3.5.3), which represents 11% of the population of Galway City. The designated district centre at this location comprises lands to the north and south of the Western Distributor Road.

The retail facilities cover an extensive area and are surrounded by a business park to the north, a Gaelscoil and residential areas to the east and west. The retail facilities present in this area comprise of:

- Gateway Shopping Park, consisting of three building complexes surrounding a surface and partly underground car park;
- A mixed-business building with various enterprises to the south;
- Two buildings with discount convenient stores as main anchors along Western Distributor Road.

The lands to the north are largely built out with the remaining undeveloped lands earmarked to accommodate primarily residential development with permission granted for over 200 units. The lands to the south are yet to be developed and are envisaged to accommodate mixed uses.

The overall state of retail was considered above average, with particularly the façade design elements, the perception of safety, and the retailer representation in the area standing out. The high presence of comparison and bulky goods retail, however, should be monitored as this could have potentially have a negative impact on city centre locations. The area exhibits deficiencies with regard to accessibility for actives modes and public transport, environmental quality and public realm, and diversity of uses, particularly leisure, cultural, entertainment facilities, as well as gastronomical offer.

Westside

Westside is located approximately 2 km west of Galway city centre and forms an established, higher density area contiguous with other parts of the inner suburbs and the city centre. The 15-minute walk-time catchment from the retail facilities has been identified as covering a population of approximately 12,500 persons (see chapter 3.5.3), which represents 15% of the population of Galway City. It has a wide range of commercial, community and amenity facilities and services and is within a well-established neighbourhood with a strong community.

The retail facilities are located on both sides of the Seamus Quirke Road and comprise of:

- Westside Shopping Centre, consisting of a single building complex a surface car park, fast-food restaurant and petrol station)
- A mixed-business building with various enterprises south of Seamus Quirke Road;
- A mixed-business building (West City Centre Office & Retail Park) with various enterprises, including a discount retail store as anchor to the east.

Westside's location in close proximity to a variety of community cultural, educational, leisure, and medical offers being an advantage. It is noted also that newly permitted developments including a primary care centre and student housing will add to the diversity of uses and vitality of the district centre. Its location either side of the Seamus Quirke Road with bus and cycle lanes also adds to the accessibility of the centre. Significant issues were identified in relation to environmental quality, public realm, accessibility, retailer representation, vacancy levels, pedestrian flows, and perception of safety. The area is characterised as aged and fragmented, with obvious vacancy and limited retail offers for the status of district centre. Connectivity and design of the public realm requires improvement to enhance opportunities for greater dwell time. If these issues were adequately addressed, this would result in a significant improvement of the retail landscape of the area. There are also opportunities for redevelopment with greater utilisation of space and street frontage through scale and massing to enhance the urban environment.

Doughiska

Doughiska is located approximately 5 km north-east of Galway city centre and forms an established, low density residential area in the outer suburbs of Galway City. The 15-minute walk-time catchment from the retail facilities has been identified as covering a population of approximately 4,000 persons (see chapter 3.5.3), which represents 5% of the population of Galway City.

The retail facilities cover a clearly defined area (i.e., Briarhill Shopping Centre and a separate building containing a fast-food chain) which is bounded by Bóthar na dTreabh to the north and east, beyond which is Briarhill Business Park, a hotel, agricultural land, as well as residential areas (to the south and west). Doughiska District Centre takes the form of a medium sized shopping centre with a national multiple as an anchor, supporting convenience, mixed with comparison goods. The district centre also includes for small comparison units, a number of local services and restaurants. It has potential on the remaining lands for expansion to broaden the mix and to include for residential use with permission granted for residential with ground floor retail.

The location in close proximity to various business activities, tourist accommodation, and the Bóthar na dTreabh is an advantage. Its location along a high frequency bus route adjacent to bus stops and proximate to the Doughiska road cycle network add to the accessibility of the centre. Significant issues were identified in relation to permeability, environmental quality, public realm, and additional deficiencies in relation to diversity of uses, retailer representation, vacancy levels, and pedestrian flows. The area is characterised as disconnected from nearby areas and highly car-centric giving rise to traffic congestion at peak times. Pedestrian and cycle connectivity and design of public realm requires improvement.

Ardaun

Ardaun to the east of the city is a future sustainable urban extension to the city with capacity to accommodate a population of over 12,000.

The development of Ardaun will be focused around an attractive and accessible new urban village and residential neighbourhood providing a variety of homes with a network of streets, open spaces and public realm. An LAP for Ardaun envisaged a range of uses within a designated Urban Village Centre to support the neighbourhood population and also to cater for some of the immediate needs generated by the significant commuting population working nearby and the anticipated workforce that the area will attract. Regarding retail in particular, it envisages a 'district centre likely to include a mix of convenience and comparison goods, service retail, recreation and community facilities'[22].

[22] *Ardaun Local Area Plan, p.6.*

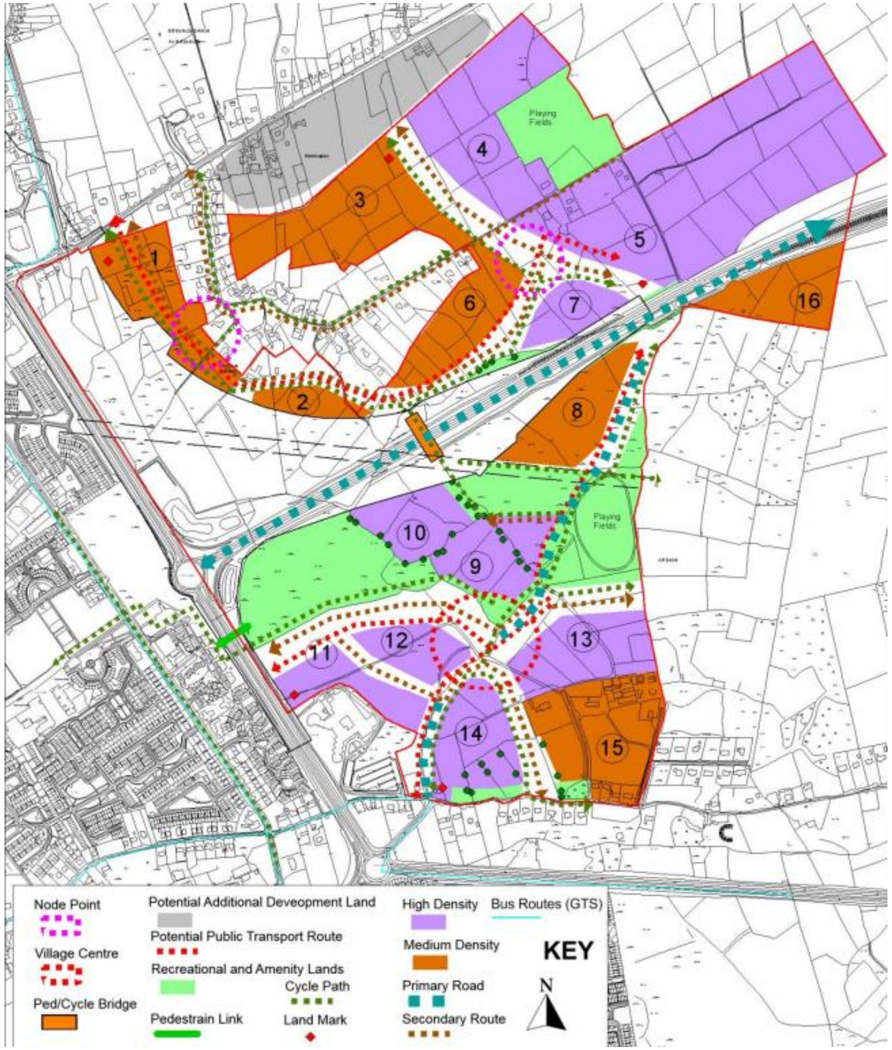


Figure 40: Ardaun LAP Urban Design Framework (Source: Ardaun Local Area Plan 2018-2024)

6.4. Metropolitan Settlements Oranmore, Bearna, Baile Chláir

Oranmore

Oranmore is a historic metropolitan settlement with a growing population. It is characterised by typically lower density residential areas. In recent years, there has been substantial residential development to the south of the settlement, east of the N67. The 15-minute walk-time catchment from the retail facilities has been identified as covering a population of approximately 4,800 persons (see chapter 3.5.3), which represents 80-85% of the population of Oranmore.

The bulk of retail facilities in Oranmore can be found in three separate areas:

- A purpose-built shopping centre at Station Road (Oran Town Centre), with a major supermarket as main anchor and various ancillary retail and non-retail uses
- Historical core along Main Street and recent purpose-built additions in the shape of a major supermarket offering convenience and comparison goods and a discount supermarket to the west of Main Street
- A purpose-built shopping complex further south along Main Street, with a discount supermarket as main anchor and various ancillary non-retail uses.

Additionally, there are several community facilities north of Oranmore bypass (Eastern Approach Road), comprising of a cinema, several gastronomical uses, fitness centres, and a hotel. The retail areas are partly or fully surrounded by residential uses, with a number of educational and medical facilities, tourist accommodations and cultural facilities in the vicinity.

Relative to its size and catchment, Oranmore is well-served with retail offers, and exceeds convenience retail offers, however, the growing population means this will have to be maintained and improved. Oranmore also performs well in relation to perception of safety. While the location of retail in close proximity to a variety of educational, cultural, and medical facilities, a number of leisure, entertainment and gastronomical uses are further away from the retail areas and thus limit the attractiveness of the central areas in favour of peripheral areas. Observations in relation to potential for improvements in the environmental quality, public realm, and accessibility were noted during the health checks. Due to the disjointed location of the three retail areas, efforts are required that can create an actual spatial and perceived connection. Despite the existence of a bypass, connectivity and design of the public realm would benefit from improvements to enhance accessibility, pedestrian safety and to increase dwell-time for visitors to the settlement, as well as to strengthen the link between the three retail areas.

Bearna

Bearna is a metropolitan settlement with a growing population. Substantial residential development has taken place recently in Bearna especially to the north of the R336. It is characterised by low density residential areas. The 15-minute walk-time catchment from the retail facilities has been identified as covering a population of approximately 2,100 persons (see chapter 3.5.4), which extends beyond the Bearna BUA to cover smaller areas outside of Bearna as well.

The bulk of retail facilities in Bearna is concentrated along a 400m stretch of Barna Road in the centre of the settlement. The core of this retail area extends south of Barna Road to include a shopping complex with a supermarket and several ancillary uses. The retail area is fully surrounded by residential uses, with a number of educational and medical facilities, tourist accommodations and cultural facilities, as well as offices in the vicinity.

Relative to its size and catchment, Bearna is well-served with retail offers and this shall be maintained and improved to cater for the new population. Bearna also performs well in relation to perception of diversity of uses, vacancy, safety, and pedestrian flows. Observations in relation to environmental quality, public realm, and permeability were highlighted during the health checks. Connectivity and design of the public realm could benefit from improvement to accessibility, pedestrian safety and to increase dwell-time for visitors to the settlement.

Baile Chláir

Baile Chláir is a metropolitan settlement and a Gaeltacht with a growing population. It is characterised by low density residential areas. The 15-minute walk-time catchment from the retail facilities has been identified as covering a population of approximately 1,600 persons (see chapter 3.5.4), which covers all of Baile Chláir.

The bulk of retail facilities in Baile Chláir is concentrated along a 550m stretch of Tuam Road in the centre of the settlement. The retail area is largely bordered by residential uses, with a number of educational and medical facilities, tourist accommodations, leisure and cultural facilities, as well as offices in the vicinity.

Relative to its size and catchment, Baile Chláir is well-served with retail offers, and with the opening of a discount store at the east side of Tuam Road it is likely to exceed convenience retail requirements. Baile Chláir also performs well in relation to perception of diversity of uses, vacancy, and safety. Connectivity and design of the public realm requires improvement to improve accessibility, permeability, pedestrian safety, environmental quality and to increase dwell-time for visitors to the settlement.

7. Projected Retail Floorspace Requirements

7. Projected Retail Floorspace Requirements

7.1. Introduction

A quantitative analysis has been prepared to determine the future retail floorspace requirement likely to present in the study area, and this has been set out in summary through this chapter. The intent is to model what future floorspace needs may exist across the Study Area up to 2034 – assuming reasonable assumptions of change. The quantitative analysis reflects guidance established by the Retail Planning Guidelines 2012 and conventions as utilised in similar plan-making (i.e., other joint retail strategies), especially to reflect and incorporate review of changing market dynamics.

The analysis herein considers emerging trends in the retail market (as discussed in Chapter 3), it develops projections for future demand, consumer spending, and estimates the potential capacity for future floorspace after considering existing floorspace across the study area. The analysis reflects a changing population in line with the relevant projections set out for both Galway City and Galway County Metropolitan area, as per Scenario 2 of the population projections outlined in chapter 2.1.2. The base year for the assessment is 2022, unless otherwise specified and figures may include some rounding.

The retail floorspace assessment focuses on the examination of three types of retail:

1) Convenience;

2) Comparison Non-Bulky (referred to as ‘comparison’); and

3) Comparison Bulky (referred to as ‘bulky’).

Consideration as to each type has been given in accordance with the descriptions set out in Annex 1 of the Retail Planning Guidelines.

As the analysis reflects a joint-retail area, the structure of the summary will reflect at first the study area as an agglomerated study area, and then a breakout for each local authority’s share of the study area.

The estimated future floorspace requirements derived from the modelling process are not intended to give black and white answers but rather provide modelled indicatives of anticipated future changes that are likely to impact on the future need for retail floorspace in the study area. Therefore, these figures should not be seen as prescriptive in nature or as a barrier to competition. Estimated figures are representative and should be considered in line with Annex 3 of Retail Planning Guidelines which states the importance of ‘quantifying the broad extent of future retail floorspace requirements’.

The allocation of any identified additional floorspace to the existing footprint of convenience, comparison, and bulky is described in this Chapter.

7.2. Methodological Approach

The following approach describes the step-by-step methodology used in the assessment of existing and future retail floorspace capacity across the catchment areas:

- Step 1: Establish catchment areas of assessment and utilise the agreed population forecasts in base, period and design years;
- Step 2: Estimate the available expenditure per capita for each of the retail categories (convenience, comparison and bulky goods) at the base year and design year;
- Step 3: Compile a projection of the total available expenditure in the base year and design year for residents to allow for assumed expenditure inflows and outflows;
- Step 4: Using all of the above data points, and assumptions of turnover per metre square, the model identifies the residual surplus or shortfall.
- Step 5: Summarise the capacity potential for additional floorspace across each of the three retail categories accounting for vacancy and pipeline projects.

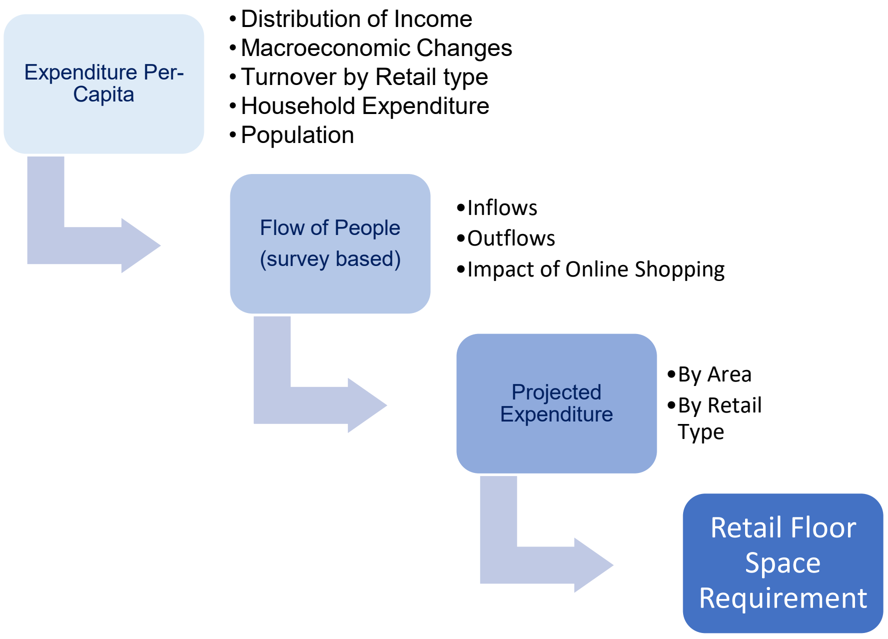


Figure 41: Infographic of the Methodological Approach (Source: KPMG Future Analytics)

7.3. Retail Floorspace Assessments

Existing retail floorspace across the study area has been assessed in aggregate through the use of a hybridised review approach. Data sources for this review included the Geodirectory commercial address database as well as returns from the Valuations Office, in both cases, relevant retail trading for the purposes of this strategy was identified.

As part of the study, validation on these commercial addresses was conducted through a combination of on-site visits (in places, particularly within the core retail area of Galway City, three District Centres, and the three Small Town Centres), as well as collaborative review with both local authorities.

Given the hybridised approach, where properties assessed in gross area terms were observed, a gross to net reduction was applied, of:

- Convenience Goods – 75:100 net to gross;
- Non-Bulky Comparison Goods – 75:100 net to gross;
- Bulky Comparison Goods – 85:100 net to gross.

The majority of the floorspace data produced was sourced on a net retail area basis, and so was used without further adjustment.

Importantly, the function of incorporating the existing retail floorspace is not to determine an entirely accurate survey of premises, but to establish broad indicatives of retail trading by type and location. Naturally this picture evolves over time, and due to various reasons the efficiency of retail area in a premises may also change.

The review of existing retail floorspace is set out in Table as follows:

Table 7-1 Total Net Retail Floorspace with Catchment Area

Existing Retail Floorspace (Net) m2 by Area				
Area	**Convenience**	**Comparison**	**Bulky**	**Total**
Galway City and Suburbs	31,779	105,310	31,101	168,190
Oranmore	8,647	7,919	3,962	20,528
Baile Chláir	1,835	1,044	153	3,032
Bearna	718	478	-	1,196
Metropolitan Area	**42,979**	**114,751**	**35,216**	**192,946**

Overall, there is 192,946 m^2 (net) of mixed floorspace across the study area in 2024. Unsurprisingly most of the retail floorspace, 87%, lies within Galway

City and Suburbs in comparison to 11% in Oranmore. There is only a small share of 3,032 m^2 (2%) of retail floorspace in Baile Chláir, and 1,196 m^2 (1%) in Bearna. This can be further split by retail category, as per the Table 7-1.

7.4. Estimated Expenditure

The future retail floorspace requirements are calculated using the various inputs as outlined in the preceding subsections.

Analysis and modelling of the inputs provide potential expenditure by retail category, which subsequently informs the minimum additional floorspace requirements for each catchment area over the lifetime of the retail strategy.

Estimated expenditure is converted to floorspace required to support it with assumptions on current and future turnover per metre square[23]. This is then compared with existing retail floorspace to see if there is a shortage or excess of floorspace by retail category and areas focussed on the study.

- Therefore, a positive difference in figures suggests a 'surplus' of floorspace.
- In turn, a negative difference suggests a 'shortage' in 'required floorspace.

7.5. Final Floorspace Potential

Preliminary Results indicate [24]

- a shortage of **convenience** retail space for Galway City and Suburbs, and Bearna for all the study years;
- a surplus of **convenience** retail space for Oranmore, for the entire period (but decreasing over time)
- for Baile Chláir, a surplus of **convenience** retail space over the study period.
- a surplus of retail space until 2034 for **comparison** retail in the entire study area - Galway City and Suburbs, Oranmore, Baile Chláir, and Bearna;
- a surplus of retail space until 2029 for **bulky** retail in Galway City and Suburbs, which changes to a shortage from 2030 onwards.
- a surplus of retail space for **bulky** retail in Oranmore for the entire study period.
- a slight surplus of retail space for **bulky** retail in Baile Chláir for the entire study period.
- a slight shortage of retail space for **bulky** retail in Bearna for the entire study period.

Table 7-2 Floorspace surplus and shortage figures for 2034 [25]

BUA	Convenience		Comparison		Bulky	
	Surplus/ Shortage	**Area m^2**	**Surplus/ Shortage**	**Area m^2**	**Surplus/ Shortage**	**Area m^2**
Galway City and Suburbs	Shortage	-41,572	Surplus	18,497	Shortage	-4,600
Oranmore	Surplus	196	Surplus	3,272	Surplus	1,760
Baile Chláir	Surplus	277	Surplus	436	Surplus	34
Bearna	Shortage	-1,110	Surplus	166	Shortage	-79

[23] *The model assumes current turnover per metre square to be €9000 for convenience, €3000 for comparison, and €2000 for bulky goods.*

[24] *For robustness a situation where current turnover is increased by 10% is also considered – overall direction of the result is unchanged. See scenario 2 results in Appendix 1 for details.*

[25] *These figures assume 100% of the vacant spaces to be available and 50% of the pipeline projects to be implemented. Table 7-3 assumes 50% of the vacant spaces to be available and 50% of the pipeline projects to be implemented.*

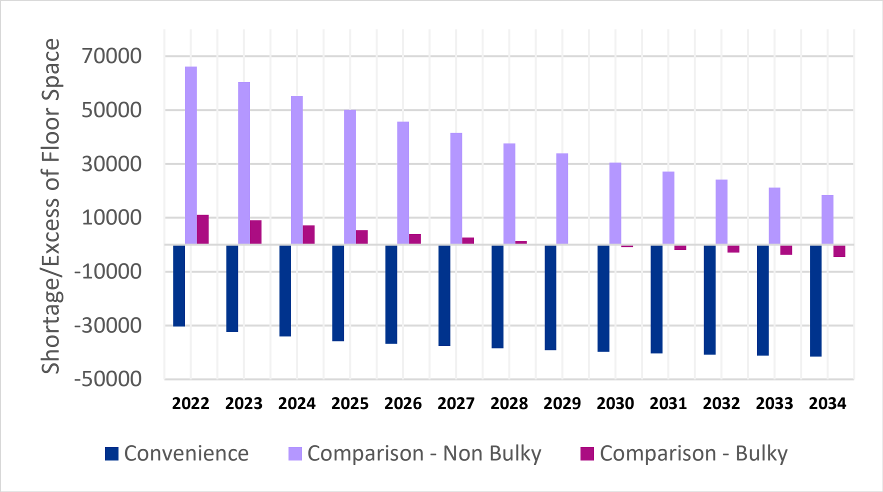


Figure 42: Shortage/Excess of Floorspace 2022-2034 in Galway City and Suburbs (Source: KPMG Future Analytics)

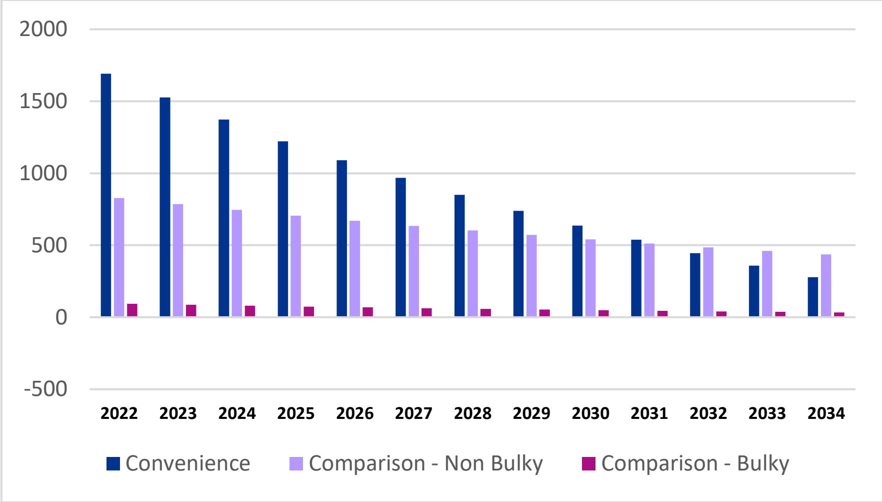


Figure 44: Shortage/Excess of Floorspace 2022-2034 in Baile Chláir (Source: KPMG Future Analytics)

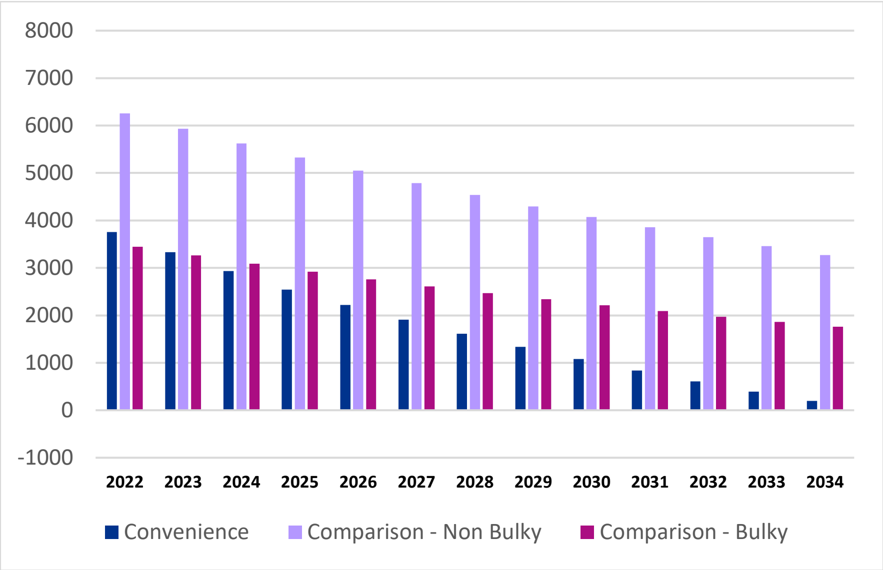


Figure 43: Shortage/Excess of Floorspace 2022-2034 in Oranmore (Source: KPMG Future Analytics)

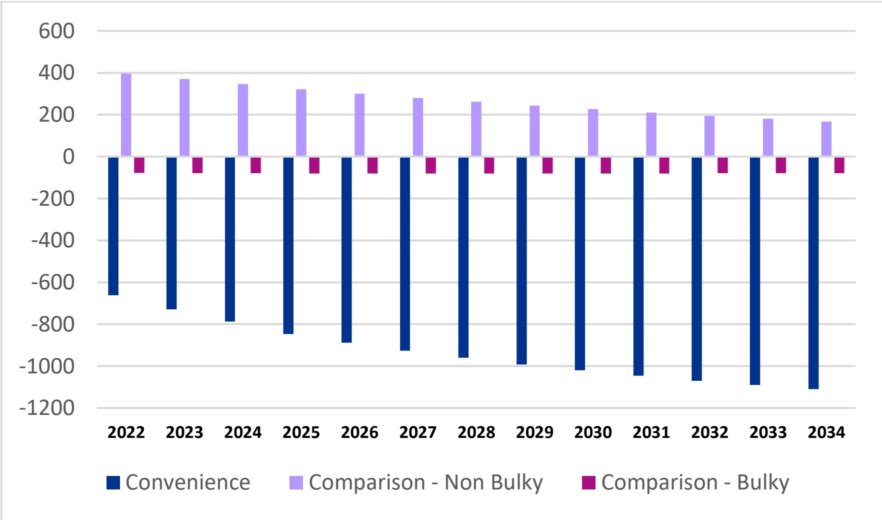


Figure 45: Shortage/Excess of Floorspace 2022-2034 in Bearna (Source: KPMG Future Analytics)

Table 7-3 Floorspace surplus and shortage figures for 2034 (assuming only 50% of the vacant spaces will be available and only half of the pipeline projects will be implemented) [26]

BUA	**Convenience**		**Comparison**		**Bulky**	
	Surplus/ Shortage	**Area m²**	**Surplus/ Shortage**	**Area m²**	**Surplus/ Shortage**	**Area m²**
Galway City and Suburbs	Shortage	-43,986	Surplus	10,498	Shortage	-7,277
Oranmore	Shortage	-32	Surplus	3,064	Surplus	1,642
Baile Chláir	Surplus	243	Surplus	416	Surplus	31
Bearna	Shortage	-1,181	Surplus	119	Shortage	-79

[26] *Since not all vacant spaces are assumed to be available, compared to Table 7-2, shortages are increased, and surplus are decreased in Table 7-3*

8. Strategic Guidance

8. Strategic Guidance

8.1. Introduction

This chapter of the report sets out the key recommendations of the Joint Retail Strategy, including the identification of key opportunity sites for future large-scale redevelopment. The implementation of the objectives and recommendations will safeguard Galway's position as an economic driver for the wider NWRA region.

The need to provide a Joint Retail Strategy that will create a healthy and vibrant retail landscape together with providing a platform to guide future retail development is of fundamental importance and presents an exciting opportunity for the Metropolitan Area. The recommendations and objectives as set out in the Visions and Actions statement at the start of the document provide an ambitious strategy to promote a dynamic, resilient, sustainable and inclusive retail environment that serves the needs of our communities while supporting local enterprise and investment.

The implementation of the recommendations and objectives will play a key role in guiding retail development in the City Centre and Metropolitan Area and will actively contribute to enhancing the vitality and vibrancy of Galway's urban areas. The recommendations and objectives are interwoven and heavily underpinned by clear recognition that we need to promote sustainable retail practices and the circular economy together with providing a platform whereby indigenous retailing can prosper.

8.2. Galway City Centre – Level 1 Metropolitan Centre

The approach of the strategy is to enhance the city centre as the primary retail service centre in the MASP area. The expansion of major retail development will continue to be focussed on the city centre. It is considered that the success of expansion of retailing in the city centre will be strengthened where it is delivered in tandem with a mix of complementary non-retail uses such as food and beverage offers, culture, recreation, leisure uses and for improvements to the public realm. The enhancement of the retail experience including markets, outdoor seating and dining, arts and culture events add to the vitality and vibrancy of the city centre and increase footfall and dwell-time. These complementary measures give confidence for future investment in the sector and strengthens the resilience of the city centre to changing retail trends.

City centre living is critical in supporting the retail economy. In particular the development of brownfield and underutilised city centre sites with capacity to create new communities with ease of access to shopping will expand the customer base and add to the vibrancy and atmosphere of the city centre. Measures to support city centre living through the Living City initiative and THRIVE the Town Centre First Heritage Revival Scheme, supporting reuse and rehabilitation of existing stock and in particular the use of upper floors will continue to be supported. Opportunities to address vacancy and dereliction through a dedicated city council team will also be supported. A balance however is required to ensure that ground floor retail uses are maintained to support an enlivened street and to protect the retail function of main shopping streets.

Improving accessibility and walkability of the city centre is a key aspect to support city centre retail. Implementation of active travel and public realm improvements including increased pedestrian streets, greater pedestrian priority and public transport projects such as the Cross City Link and Bus Connects will improve accessibility and the quality of the city centre environment by reducing car traffic, improving walkability, cycle access and deliver improved journey times for buses. Upgrades to Ceannt station currently underway will also add to the accessibility of the city centre.

The city centre includes a number of regeneration lands that can seamlessly link in with the existing primary and secondary shopping streets, support additional retailing with capacity for new formats and larger floorplates and sequential growth in the retail offer in the city. These lands are located around Ceannt station, the Harbour and at Headford Road. They represent transformative opportunities for developments of scale with new residential communities and mixed uses including retail complementing the experience of the city centre.

Table 8-1 City Centre (Historic City Centre) Recommendations

Criteria	Recommendation	Priority
Diversity of uses	Promote increased city centre living through residential infill and development of city centre regeneration sites Promote the Living City initiative	Medium-term
Diversity of uses	Explore the establishment of additional leisure and entertainment uses including markets, arts and cultural events and potential opportunities for outdoor dining/ seating and uses in public spaces	Medium-term
Diversity of uses	Masterplan for Harbour area to diversify use and promoted residential, office and other commercial use	Ongoing
Retailer representation and competitiveness	Promote/ facilitate additional convenience and comparison retail through business incentives and marketing	Short-term
Commercial vacancy levels	Maintain a vacancy register that tracks trends and outlines steps for vacancy removal for key sites	Short-term
Accessibility	Improvement of pedestrian infrastructure to Headford Road; creation of shared space; improvement of walkability to/from Corrib Shopping Centre	Short-term
Accessibility	Improvement of cycling infrastructure in the centre and towards neighbouring areas; Provision of roofed bicycle parking facilities	Short-term
Accessibility	Explore improvement of connectivity to Ceannt Quarter, Headford Road and Harbour area and across the River Corrib	Long-term
Accessibility	Implement the GTS including objectives for the Cross City Link and enhanced pedestrian and cycle infrastructure. Roll out Galway BusConnects and consider light rail as part of the review of the GTS	Long-term
Accessibility	Parking strategy for edge of city multi-storey parking with direct pedestrian-friendly walk-ways to city centre; explore removal of surface car parking	Medium-term
Environmental quality	Conserve and enhance traditional shop fronts through the shopfront enhancement scheme and other grant schemes. Ensure use of Irish and bilingual signage Remove redundant signage and wiring to minimize street clutter. Protect the historic character of the city centre in particular the medieval street pattern and narrow plot width. Implement urban greening measures such as street tree planting, rain gardens and use of green design features in the public realm.	Short-Term
Public realm	Create high-quality public space with street furniture, landscaping and other design elements and with capacity for events and activities and social interaction.	Medium-term
Perception of safety and occurrence of crime	Retain and support active ground floor frontages Ensure street networks are well connected with good passive surveillance and public lighting Ensure clean streets and good maintenance including graffiti removal Implement a wayfinding scheme Advocate for greater garda presence in key areas along main shop, secondary streets and continue to support initiatives such as the	Short-term

	Purple Flag Award supporting the city centre as a safe destination	
Pedestrian flows	Promote walkability between historic city centre and Headford Road	Medium-term

The following recommendations for the City Centre (Headford Road) are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-2 City Centre (Headford Road) Recommendations

Criteria	Recommendation	Priority
Diversity of uses	Facilitate planned redevelopment of scale with comprehensive mixed-use development such as offices, restaurants, cafes, tourism amenities, leisure, and entertainment and a new residential community.	Medium-term
Commercial vacancy levels	Maintain a vacancy register that tracks trends and outlines steps for vacancy removal for key sites	Short-term
Accessibility	Improvement of pedestrian and cycling infrastructure to the Historic City Centre along Headford Road, Bóthar na mBan and Woodquay	Short-term
Accessibility	Improvement of walking and cycling infrastructure in and between each commercial area and linking with the Dyke Road area and including a bridge link to the university Explore reduction in (overground) car parking	Short-term
Accessibility	Provision of EV parking in each part of Headford Road commercial area	Short-term
Accessibility	Provision of roofed bicycle parking facilities within each part of Headford Road centre	Short-term
Environmental quality	Ensure high quality urban design and architecture in any redevelopment Façade uplift of Galway Shopping Centre	Medium-term
Environmental quality	Promote measures to enhance biodiversity, such as tree planting, SuDS, and the use of green infrastructure. Reduce the visual impact of surface car parking areas through additional soft landscaping.	Medium-Term
Environmental quality	Explore utilisation of building roofs for PV	Long-term
Public realm	Create high-quality public space with play facilities, street furniture, and other design elements.	Medium-term

Opportunity Sites - Ceannt Quarter Regeneration Site

The Ceannt Quarter Regeneration Site has potential to deliver a mixed-use development at transformative scale with planning permission granted for a large scheme in 2023. It offers a sequential solution to the expansion of the city centre, linked with Ceannt station, a multi modal transport interchange, reinforcing the prime role of the city centre in the Metropolitan Area and the wider region. Ceannt Quarter will generate significant employment growth which will boost the existing retail economy. It also has capacity to cater for larger retail floorplates which cannot readily be accommodated in the existing historic core.

The delivery of a vibrant mixed-use scheme together with the upgrade of Ceannt station will create additional footfall to support new retail development and provide a fully integrated scheme that will maximise investment in public transport infrastructure. The strategic location of the lands provides an opportunity for a connection between the City Centre and the harbour area. It provides a tangible opportunity to support the principles of the ’15-minute city’ concept.

It is a recommendation of this Strategy to support the redevelopment of these lands in line with the objectives of the City Development Plan and the Augustine Hill planning permission which includes in excess of 26,000 sqm of retail floorspace.

Opportunity Sites - Headford Road Regeneration Site

The Headford Road area south of the Bodkin junction is located within the defined core shopping area. It includes a significant level of comparison and convenience retail floor space within the Galway Shopping centre and Galway Retail Park. This area presents significant opportunities for mixed use development including retail through redevelopment of underutilised surface car parking and low-density retail park formats. The redevelopment of the City Council Dyke Road carpark to include for significant residential development in partnership with the LDA will bring new life and footfall to this area. It will complement the diversity of uses at this location and will act as a catalyst for wider regeneration of this area. Active travel and amenity projects including a new bridge across the River Corrib linking this area with NUIG will add to the character and attractiveness of the area. Of critical importance is to implement improved pedestrian linkages to the city centre in particular along Headford Road, Bóthar na mBan and Woodquay. As identified in the City Development Plan, the redevelopment of the lands could act as the logical and coherent expansion and consolidation of the City Centre. It is a recommendation of this Strategy to support the redevelopment of these lands to create a vibrant mixed-use area with opportunities for additional retail development.

Opportunity Sites - Other City Centre Regeneration Sites

Other key city centre regeneration sites include the Inner Harbour which offers potential for large scale redevelopment with a waterfront setting. This area offers an opportunity for a mix of uses which will complement the coastal setting and add to the diversity of uses proximate to the city centre. In particular, it has potential to accommodate a new neighbourhood, and plans are advancing with the Land Development Agency to advance residential development on part of these lands.

The Eyre Square East Regeneration Site also has capacity for redevelopment as a new city centre quarter which could support a diversity of uses, adding to the retail offering and the viability and vitality of the city centre. The future development of designated regeneration sites at Nuns Island for education and innovation uses and Henry Street for residential uses will provide opportunities to support worker, student and residential populations supporting the retail economy of the city centre.

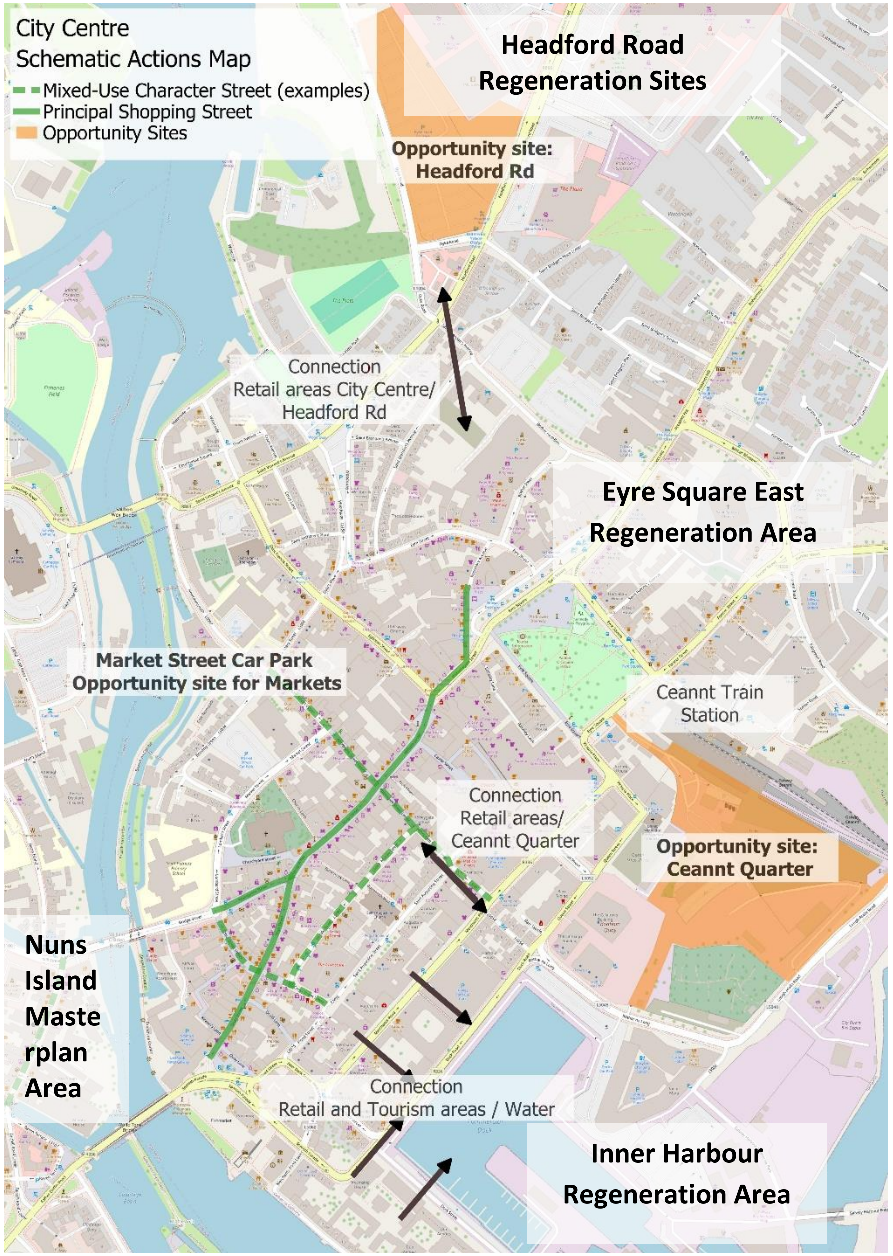


Figure 46: Schematic Actions Map (Source: KPMG Future Analytics)

8.3. Level 3 District Centres

District centres at Knocknacarra, Westside and Doughiska provide an important retail and service function to a wide local catchment. The scale, function and character of these centres varies. While they play a key role in the retail economy of the city, they also include a range of employment, residential, community and cultural facilities. These centres reduce the need to travel into the city centre for goods that can be located in the suburbs without having a negative impact on the functioning of the city centre which will still be the reserve of high order shopping. They will continue to evolve as mixed-use centres with an emphasis on integrating with the public transport network and supporting the 15-minute city concept. Retail will primarily be of a convenience nature or smaller lower order comparison type in order to protect the prime role of the city centre for shopping. A planned district centre at Ardaun on lands zoned for an Urban Village Centre will serve the future neighbourhood and contribute to the diversity of the retail environment across the city.

Knocknacarra District Centre

The approach to development of the remaining lands (6.6ha) south of the western distributor road is to function more as an 'urban village' type centre than purely a shopping area. It is anticipated that these lands will deliver a good mix of uses including convenience retail and will complement the current large floorplate retail uses on the northern side. In this regard complementary uses include uses for local retail services, social and community services, recreation, culture and leisure uses. A significant proportion of the development capacity of the site will deliver housing. The development plan requires a minimum of residential/residential commercial development of a scale equivalent to 50% of the development capacity of the site. This type of mixed-use development will support a vibrant, sustainable neighbourhood, will reduce car dependency and travel distances and contribute to compact growth. The proximity to local schools, parks and open spaces, greenway linkages together with planned BusConnects and sustainable mobility improvements along the western distributer road will ensure that the District Centre is also well placed to contribute to the concept of the 15-minute neighbourhood.

The following recommendations for Knocknacarra District Centre are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-3 Knocknacarra District Centre Recommendations

Criteria	Recommendation	Priority
Diversity of uses	Facilitate the development of vacant commercial lands for comprehensive mixed use development, with uses such as residential, restaurants, cafes, tourism amenities, leisure, entertainment, community type facilities and a new residential community	Long-term
Accessibility	Improvement of walking and cycling infrastructure in and between each parts of the district centre through creation of consistent direct ways or shared space Explore reduction in (overground) car parking and dedication of space to high quality public realm	Short-term
	Improvement of walking and cycling infrastructure to integrate the area with its adjacent residential areas, e.g., connecting Bóthar Stiofáin and Gort na Bro (permeability) Facilitate integration with the BusConnects programme and enhanced linkages to existing bus stops.	Short-term
Accessibility	Provision of EV parking in each part of the district centre	Short-term
Accessibility	Provision of roofed bicycle parking facilities within each part of the district centre	Short-term
Environmental quality	Promote measures to enhance biodiversity, such as additional tree planting, SuDS, and the use of green infrastructure.	Medium-Term
	Reduce the visual impact of surface car parking areas through additional soft landscaping.	
Environmental quality	Explore utilisation of building roofs for PV	Long-term
Public realm	Create high-quality public space with playground, street furniture, other design elements.	Medium-term

Figure 47: Knocknacarra District Centre - Proposed Extent (Source: KPMG Future Analytics, based on Google Maps)

Westside

Westside is more established than the other two existing district centres and serves a broader function than just a shopping area. It is located in a well-established neighbourhood with a strong community. It has a legacy of mainly convenience floor space, with a range of commercial, enterprise and community services and amenity facilities. It exhibits an area in transition from older more industrial type uses to a gradual delivery of more diversified services and facilities. The area has significant potential for redevelopment of scale to include for a mix of uses. Retail uses including convenience retail and small-scale lower order comparison type retail which would not detract from the city centre are envisaged to serve the local catchment and the nearby employment hubs including UHG and NUI Galway. Other uses including residential and healthcare uses which are permitted and planned will add to the vitality and vibrancy of Westside and enhance the diversity of uses. This area has benefited from investment in recreation facilities, access upgrades including bus lanes and cycle lanes and ensures that the centre aligns well with the 15-minute city concept.

The following recommendations for Westside District Centre are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-4 Westside District Centre Recommendations

Criteria	Recommendation	Priority
Extent	To include Westside Shopping Centre, mixed-business building south of Seamus Quirke Road, and West City Centre Office & Retail Park	Short-term
Diversity of uses	Enhance the mix of uses in or nearby the district centre, such as residential, offices, restaurants, cafes, tourism amenities, leisure, and entertainment.	Long-term
Retailer representation and competitiveness	Identify opportunities to increase the retail offer, particularly in the higher priced convenience and comparison goods spectrum, as well as other types of retail	Medium-term
Accessibility	Improvement of permeability between each part of the district centre through creation of consistent direct ways or shared space and dedication of space to high quality public realm	Short-term
Accessibility	Provision of EV parking in each part of the district centre	Short-term
Accessibility	Provision of roofed bicycle parking facilities within each part of the district centre	Short-term
Environmental quality	Facilitate redevelopment to create an enhanced urban environment through scale and massing and a strong urban edge along Seamus Quirke Road. Ensure high quality urban design and architecture in any redevelopment	Medium-term
Environmental quality	Promote measures to enhance biodiversity, such as additional tree planting, SuDS, and the use of green infrastructure. Reduce the visual impact of surface car parking areas through additional soft landscaping.	Medium-Term
Environmental quality	Explore utilisation of building roofs for PV	Long-term
Public realm	Create high-quality public space with play facilties, street furniture, other design elements	Medium-term
Perception of safety and occurrence of crime	Facilitate animated streets and active ground floor uses and ensure good overlooking and passive surveillance of linkages, streets and spaces	Short-term
Pedestrian flows	Improve ease of walkability and cyclability within and between various parts of retail area and into adjacent residential areas (permeability)	Medium-term

Figure 48: Westside District Centre - Proposed Extent (Source: KPMG Future Analytics, based on Google Maps)

Doughiska

The Doughiska district centre is smaller in scale than Knocknacarra and Westside but still has potential for consolidation on undeveloped residentially developed lands. The district centre at Doughiska developed in parallel with the population growth and is supplemented by a neighbourhood centre and local shops along the Doughiska road. It has potential on the remaining lands for expansion to broaden the mix and potentially include for some residential uses also. Although located adjoining a main junction and with limited permeability opportunities, it benefits from a high frequency bus service and will also benefit from additional planned investments in sustainable transport modes in the area.

The following recommendations for Doughiska District Centre are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-5 Doughiska District Centre Recommendations

Criteria	Recommendation	Priority
Diversity of uses	Facilitate the redevelopment of remaining land within the district centre to broaden the mix of uses.	Long-term
Retailer representation and competitiveness	Explore opportunities to increase the retail offer.	Long-term
Accessibility	Improvement of walking and cycling infrastructure into the district centre. Enhance existing boundary permeability and dedication of space to high quality public realm.	Short-term
Accessibility	Provision of EV parking	Short-term
Accessibility	Provision of roofed bicycle parking facilities	Short-term
Environmental quality	Promote measures to enhance biodiversity, such as additional tree planting, SuDS, and the use of green infrastructure.	Medium-Term
Environmental quality	Explore utilisation of building roofs for PV	Long-term
Public realm	Create high-quality public space with play facilities, street furniture, other design elements.	Medium-term
Pedestrian flows	Improve ease of walkability and cyclability within retail area and into adjacent residential areas (permeability)	Medium-term

Figure 49: Doughiska District Centre - Proposed Extent (Source: KPMG Future Analytics, based on Google Maps)

Ardaun

The following recommendations for the planned Ardaun District Centre are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-6 Ardaun District Centre Recommendations

Criteria	Recommendation	Priority
Diversity of uses	To facilitate the establishment of a variety of uses (residential, housing, offices, healthcare, medical commercial, visitor accommodation, educational, leisure, cultural, entertainment) in line with district centre requirements	Long-term
Retailer representation and competitiveness	To identify opportunities to facilitate various price segments for convenience and comparison goods that serve the community of Ardaun	Long-term
Accessibility	To ensure ease of accessibility by actives modes and public transport	Long-term
Environmental quality	To facilitate coherent building design and quality shopfronts, quality open space, and to discourage littering and graffiti; to encourage use of rooftops for PV	Long-term
Public realm	To ensure high level of integration with wider neighbourhood through seamless design, quality hard and soft landscaping, street furniture, and public signage	Long-term
Pedestrian flows	To encourage ease of movement from and between different parts of the district centre and to residential neighbourhoods (permeability)	Long-term

8.4. Metropolitan Settlements Oranmore, Bearna, Baile Chláir

Promoting the ten-minute town concept is vital to strengthening the retail economy of Galway's Metropolitan settlements. Redeveloping brownfield and underused sites can create vibrant, walkable communities with direct access to shops and services, expanding the local customer base and enhancing urban vitality.

THRIVE (Town Centre First Heritage Revival Scheme) will continue to support the reuse of existing buildings, particularly upper floors. Tackling vacancy and dereliction will also be key in revitalising the settlements.

In tandem, improving accessibility is equally important. Active travel and public realm upgrades—including pedestrianisation, enhanced cycling infrastructure, and public transport projects will reduce car dependency and improve connectivity.

Oranmore

Oranmore provides an important retail and service function to a wide local catchment. Oranmore's retail core is anchored by Main Street, which runs north–south and is framed to the north by a river boundary.

Retail expansion has occurred west of Main Street on former agricultural lands, now hosting two supermarkets and additional commercial units. This area benefits from strong pedestrian connectivity, including a direct link from the Main Street–Old Dublin Road junction. To the east, a large mixed-use development integrates apartments and retail units, complemented by another mixed-use scheme at the T-junction north of Old Dublin Road offering retail and financial services.

The settlement supports a diverse retail mix, including shops, cafés, restaurants, pubs, and hotels. Retail activity has extended into previously non-commercial areas such as Castle Road and Oran Town Centre, the latter now a key mixed-use retail hub.

It is envisaged that encouraging the reuse of vacant and underutilised buildings and promoting sustainable, compact development patterns will benefit the settlement. Further increasing the link between the three main areas will improve the connectiveness of the settlement.

The following recommendations for the Oranmore Neighbourhood Centre are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-7 Oranmore Neighbourhood Centre Recommendations

Criteria	Recommendations	Priority
Area	To include shopping area at Main Street, Oran Town Centre (shopping complex at Station Road), Retail facilities west of Main Street, Shopping complex in southern part of Main Street	Short-term
Diversity of uses	Enhance the mix of uses in the metropolitan settlement to support retail including residential, offices, restaurants, cafes, tourism amenities, leisure, and entertainment	Long-term
Accessibility	Improvement of permeability between each part of the settlement through creation of consistent direct ways or shared space; explore reduction in surface car parking and dedication of space to high quality public realm	Short-term
Accessibility	Explore additional bus stops and upgrade of existing bus stops	Short-term
Accessibility	Provision of EV parking in all parts of the metropolitan settlement	Short-term
Accessibility	Provision of roofed bicycle parking facilities in all parts of the metropolitan settlement	Short-term
Environmental quality	Promote measure to enhance biodiversity, such as additional tree planting, SuDS, and the use of green infrastructure Reduce the visual impact of surface car parking areas through additional soft landscaping	Medium-Term
Environmental quality	Explore utilisation of building roofs for solar energy	Long-term
Public realm	Create high-quality public space with play facilties, street furniture, other design elements, and public signage in all parts of the metropolitan settlement	Medium-term
Pedestrian flows	Improve ease of walkability and cyclability within and between all parts of the metropolitan settlement and into adjacent residential areas (permeability)	Medium-term

Figure 50: Oranmore Neighbourhood Centre - Proposed Extent (Source: KPMG Future Analytics, based on Google Maps)

Bearna

Bearna accommodates a growing population. Future development should focus on underutilised, infill, and brownfield sites, prioritising serviced lands near the centre and public transport, with designated Town Centre/Infill zoned lands identified to support residential and mixed-use growth that will complement the retail offering.

While retail services are adequate in the settlement it is important that this is maintained, and that appropriate retail provision in the centre of the settlement will enhance the vitality of the settlement. The centre should evolve as a mixed-use centre while also providing community facilities for a growing population.

Retail offerings should be of convenience/lower scale comparison offering which are scaled to meet the demand of the population. The development of niche retail would complement the existing services in the settlement. The improvement of pedestrian infrastructure and transport infrastructure will improve the retail experience in the settlement.

The following recommendations for the Bearna Neighbourhood Centre are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-8 Bearna Neighbourhood Centre Recommendations

Criteria	Recommendations	Priority
Area	To include retail area along Barna Road	Short-term
Accessibility	Improvement of permeability between each part of the metropolitan settlement through creation of consistent direct ways or shared space; explore reducatioen in surface car parking and dedication of space to high quality public realm	Short-term
Accessibility	Explore additional bus stops and upgrade of existing bus stops	Short-term
Accessibility	Provision of EV parking	Short-term
Accessibility	Provision of roofed bicycle parking facilities	Short-term
Environmental quality	Promote measures to enhance biodiversity, such as additional tree planting, SuDS, and the use of green infrastructure Reduce the visual impact of surface car parking areas through additional soft landscaping	Medium-Term
Environmental quality	Explore utilisation of building roofs for solar energy	Long-term
Public realm	Create high-quality public space, street furniture, other design elements, and public signage	Medium-term

Pedestrian flows	Improve ease of walkability and cyclability along Barna Road and into shopping complex south of Barna Road	Medium-term

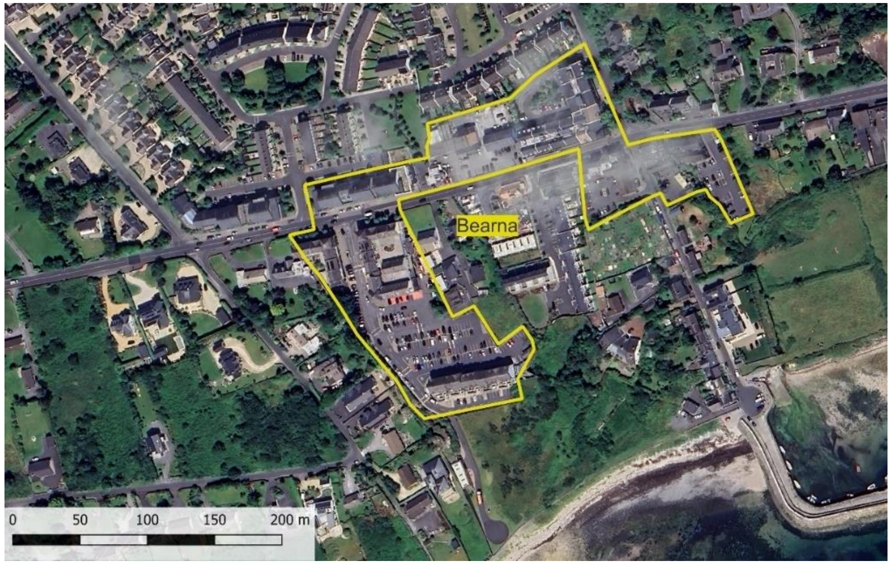


Figure 51: Bearna Neighbourhood Centre – Proposed Extent (Source: KPMG Future Analytics, based on Google Maps)

Baile Chláir

Baile Chláir is moderately active, with key commercial activity concentrated along the northwestern stretch of the N83, from Hughes's SuperValu to The Arches Hotel. It is important that the settlements' unique cultural identity is reflected in new developments.

The settlement serves a wide rural hinterland, but it is important that the core of the settlement is consolidated and to ensure services are located within close proximity to each other. This promotes compact growth and reducing urban sprawl. It provides a framework for sustainable retail and mixed-use development that strengthens Baile Chláir's role as a metropolitan settlement.

The improvement of pedestrian infrastructure in the settlement will make it a more vibrant and attractive experience for consumers as well as improvement in sustainable modes of transport to and from the settlement.

The following recommendations for the Baile Chláir Neighbourhood Centre are arising from the Retail Health Checks carried out in line with the Retail Planning Guidelines:

Table 8-9 Baile Chláir Neighbourhood Centre Recommendations

Criteria	Recommendations	Priority
Area	To include shopping area at Tuam Road, as well as newly constructed discount supermarket, and opportunity site to the back of current supermarket	Short-term
Accessibility	Improvement of permeability between each part of the settlement through creation of consistent direct ways or shared space; explore reduction in surface car parking and dedication of space to high quality public realm	Short-term
Accessibility	Explore additional bus stops and upgrade of existing bus stops	Short-term
Accessibility	Provision of EV parking	Short-term
Accessibility	Provision of roofed bicycle parking facilities	Short-term
Environmental quality	Promote measures to enhance biodiversity, such as additional tree planting, SuDS, and the use of green infrastructure Reduce the visual impact of surface car parking areas through additional soft landscaping	Medium-Term
Environmental quality	Explore utilisation of building roofs for solar energy	Long-term
Public realm	Create high-quality public space, street furniture, other design elements, and public signage	Medium-term

Pedestrian flows	Improve ease of walkability and cyclability along Tuam Road	Medium-term

Figure 52: Baile Chláir Neighbourhood Centre - Proposed Extent (Source: KPMG Future Analytics, based on Google Maps)

Garraun and Briarhill Urban Framework

Two Urban Framework Plans (UFP) have been identified in the MASP area at Briarhill and Garraun. These Urban Framework Plans are contained in Volume 2 of the Galway County Development Plan 2022 - 2028. Both will have a local nodal centre which will provide for a distinct mixed-use centre incorporating local retail and services as well as residential uses. The nodal centre in each UFP will be characterised by being a highly pedestrian environment with high quality public realm and landscaping.

8.5. Neighbourhood Centres

Neighbourhood centres are located throughout the city. They are of a smaller scale compared to the district centres. Existing centres that function as neighbourhood centres includes Salthill, Knocknacarra (Shangort), Wellpark, Renmore, Doughiska Road, Roscam; Mervue, Castlegar and Ballinfoile. They perform an important function at local level providing day-to-day food needs and services to the local community in which they are located. They can also play an important social role in their neighbourhoods and provide a physical focal point. Their functions include primarily local convenience; small comparison retail; food and beverage and cultural and leisure functions. There is scope within the city with the increased population and future housing supply to facilitate the development of new neighbourhood centres, with capacity for provision of additional convenience floorspace, located to be easily accessible by the catchment they serve and where they can contribute to the 15 minute city concept. Emerging sites which can accommodate neighbourhood facilities include the Crown Regeneration site and the Corrrib Great Southern Regeneration site. There is also capacity to allow for expansion in existing neighbourhood centres where it can be demonstrated that there is a deficit of services or where significant population is planned.

8.6. Local Shops

There are a number of neighbourhoods which have a local shop which provides a valuable local and walk in role and function to the local communities that they serve. It is important to encourage these types of developments and safeguard existing ones as they afford convenience and access by sustainable modes.

8.7. Definition of Streets

Street categorisation helps regulate activity, in particular at ground floor level, to maintain the vitality and character of the city's main shopping areas. In Galway City and Metropolitan town centres, Category one streets and mixed-use Character Streets are identified. The purpose of these designations is to protect the primary retail function of main shopping streets, to control the proliferation of uses which could lead to the deterioration of retailing on the principal shopping streets but also allows for uses complementary to the main shopping focus adding to the retail experience.

Principal Shopping Streets

It is essential to maintain and strengthen the retail character of the city centre and MASP town centres. Within the city centre, it is important to protect the primary retail function of the principal shopping streets in the retail core and to strengthen the retail offer on these streets. An emphasis on higher order comparison retail and a rich mix of retail uses on these streets will allow surrounding streets to be promoted for a wider range of retail, restaurant, and cultural activities complementing the higher order comparison shops. The conversion of the ground floors of premises on the principal shopping streets from retail to non-retail uses, including retail services shall not be permitted. For these purposes the Principal shopping streets within the city centre are Williamsgate Street, William Street, Shop Street, Mainguard Street, High Street, Quay Street and Eyre Square (north western side).

Mixed-Use Character Streets (Galway Metropolitan Area)

These are streets within the Galway Metropolitan Area Strategic Plan (MASP) area that exhibit a distinctive urban character and accommodate a diverse mix of uses such as independent retail, cafés, restaurants, cultural venues, and residential units. In Galway City, these streets are typically located within or in close proximity to the Primary Retail Core, complementing it by offering niche shopping, leisure, and social experiences. Within the City and MASP settlements, these streets often constitute the core of the settlement, forming the focal point for local retail and community activity. Across the metropolitan area, they contribute significantly to identity and vibrancy, often within a historic or architecturally distinctive setting, and play an important role in sustaining both the day and evening economy. Examples include Dominick Street Upper, Middle Street, Cross Street, Abbeygate Street in the city centre retail core and Salthill Village. In the wider MASP area, these streets would include the main streets in Bearna, Oranmore and Baile Chláir.

The approach for these Mixed-Use Character Streets is to maintain and enhance a rich and vibrant experience with a broad range of land uses and activities with active frontage, that contribute positively to the character and appearance of these Streets.

Further development of retail units will be encouraged along with complementary non-retail uses such as cafés and restaurants, cultural, tourist and entertainment uses as well as retail services that add to the vibrancy of the street and create a mixed-use environment to provide for a more integrated shopping and leisure experience. Applications for retail services at ground floor level will be assessed on their merits and may only be permitted where such development would not result in a predominance of such similar uses on the street.

8.8. Criteria for Assessment of Retail Development

All applications for significant retail development should be assessed against a range of development management criteria set out below in the Retail Planning Guidelines for Planning Authorities 2012 and City and County development plans.

Sustainability

Sustainability is a core principle underpinning this Strategy and the assessment of future retail development within Galway City and County Metropolitan area. As part of our collective commitment to climate action, this Strategy will support future retail proposals that incorporate sustainability into their retail offering particularly through locally produced and sourced products and the circular economy. Retail proposals that incorporate sustainable design practices, align with low-carbon objectives, and contribute to compact growth and the principles of the 15-minute city concept will be supported. Developments that promote active travel, are well-connected to public transport, and demonstrate efficient land use will be prioritised.

Furthermore, the use of sustainable construction practices, integration of green infrastructure, and measures to improve energy efficiency will be vital assessment criteria. Retail schemes will be encouraged to include features such as rainwater harvesting, low-carbon heating solutions, and biodiversity enhancements. Proposals that demonstrate a circular economy approach—minimising waste and supporting local supply chains—will be looked upon favourably. Overall, sustainability in retail planning will not only contribute to climate targets but also enhance resilience, liveability, and long-term economic viability across Galway.

Retail Impact Assessments

Retail Impact Assessments (RIA) should be submitted to support major proposals in order to demonstrate compliance with the City and County Development Plans and to show that there will not be an adverse effect on the existing retail centres, an undermining of the potential for the Regeneration and Opportunity Sites and that the development will contribute to achieving compact growth.

In general, the requirement to submit a RIA will be determined in the context of the City and County Development Plans policies and objectives for retailing or as may be required at pre-planning stage or in the course of assessing an application. RIAs should be carried out in accordance with the requirements set out in the Retail Planning Guidelines (2012) or any subsequent guidelines.

Design Criteria

The 2012 Retail Planning Guidelines are accompanied by the Retail Design Manual (April 2012). The Manual provides Planning Authorities, developers and designers with evidence-based quality principles to ensure that future planning for the retail sector is focussed on the creation of vibrant, quality places.

Galway City and County Councils will seek to promote high quality design in all retail proposals in line with the principles of the Retail Design Manual and relevant development management standards as set out in the City and County Development Plans. Sustainability and Conservation will play fundamental roles in the consideration of appropriate design for future retail developments in the city centre whereby the need to protect and preserve the historic building fabric is more pronounced.

Traffic & Transport Assessments

A Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold (1,000m²), or developments with significant trip generation potential as set out in the Traffic Management Guidelines 2003 and the Traffic Transport Assessment Guidelines 2014. A TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads, junctions and other transport infrastructure in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays to existing and future road-based traffic.

More importantly, TTAs are fundamental in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question. Applicants for retail development which exceed these thresholds should consult the guidelines above prior to lodging a planning application. Where traffic and transport volumes from proposed retail developments are under the thresholds for TTA outlined above, the guidelines should be consulted in regard to the criteria for sub threshold TTA. The TTA should also address urban design impacts of proposed public and private transport proposals and also deal with delivery and monitoring regimes for the various options. If the proposed development warrants an Environmental Impact Assessment (EIA), the transport assessment should form part of the EIAR

Figure 53: Garraun Urban Framework

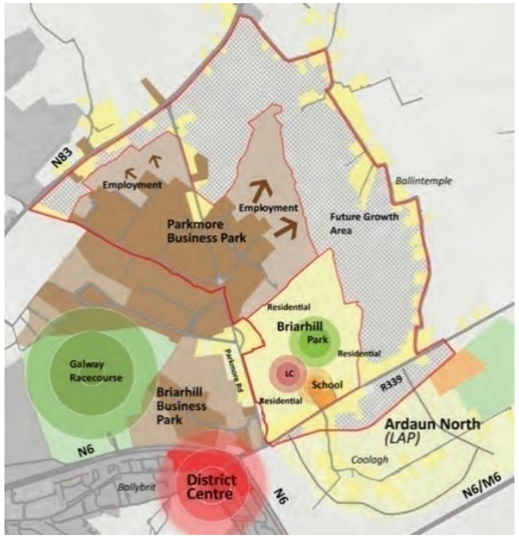


Figure 54: Briarhill Urban Framework

8.9. Implementation and Monitoring

The Retail Planning Guidelines advise planning authorities to regularly monitor trends in their areas, and update retail policies as appropriate. Recognising that the retail sector is one of the most dynamic sectors in the economy and that related trends, influences and information can change over time, the Galway City and County Councils are committed to monitoring the implementation of the recommendations and objectives as set out in this Strategy and will Report annually on progress. Opportunities for funding to deliver the objectives of the JRS will be explored.

9. Case Studies

9. Case Studies

9.1. Introduction

This chapter presents case studies that demonstrate best practices in addressing vacancies, promoting the adaptive reuse of spaces, and creating vibrant community spaces to revitalise city cores and enhance local retail offerings. The case studies cover a wide range of programs and redevelopment strategies, including local specialised retail offerings that have been successfully applied in Irish towns such as the English Market Cork, Navan, as well as in UK towns like Altrincham and Bristol. Furthermore, international exemplars such as De Hallen, Amsterdam and Vacant to Vibrant Programme, San Francisco are covered in this chapter as well.

The section also provides an overview of some of localised, specialised indigenous shops and prominent businesses across Ireland to illustrate how these offerings can enhance the retail landscape of Galway City and County.

Below is an overview of the key types of case studies discussed in the section:

National Case Studies – This section highlights exemplary Irish towns that have successfully revitalised their town centres and improved the retail environment. This was achieved in the case examples through public realm enhancements, safe and accessible placemaking initiatives, and efforts to support local business owners, thereby boosting the economy and tourism of the area. Examples include English Market, Cork; Navan, Meath; and Clonakilty, Cork.

Indigenous and Unique Irish Business Case Studies – Further to the national case studies, this section highlights examples of the thriving indigenous retail businesses in Galway, which features locally produced food, art, and apparel. These offerings serve as a distinctive selling point for the city's retail landscape.

International Case Studies – This section presents international examples demonstrating how urban vacancy and dereliction issues were addressed through various regeneration initiatives led by the public sector, the voluntary sector, the private sector, or through collaborative partnerships. Examples include case studies from United Kingdom, Europe, and United States.

An overview of the different parameters explored in the case study types is provided below:

- **Stakeholder Engagement**: Engaging and fostering strong relationships with key stakeholders, such as property owners, shopkeepers, aspiring entrepreneurs, residents, investors, groups, and organisations is important for the redevelopment of vacant spaces and revitalisation of retail areas.
- **Placemaking, Public Realm, and Access**: Delivering improved access to and within town and city centres by all modes of transport by prioritising pedestrian access in the core retail area and improving sustainable access to town centres by prioritising public and active travel modes. Access strategies must provide efficient access for persons with reduced mobility through provision of sufficient conveniently located accessible car parking facilities and designing/upgrading public transport interchanges to be accessible for all.
- **Town Centre Activation**: Driving increased footfall and retail spending in town centres and enhancing the visitor experience by organising events, festivals, markets, and other temporary uses.
- **Marketing and branding**: Driving increased footfall and retail spending in town centres, using proactive marketing of businesses and events.
- **Innovation and Creativity:** Delivering a seamless shopping experience and meeting the evolving needs of customers, it is essential to introduce innovative ideas into the business to sustain in the competitive market.
- **Asset Management:** Enhancing the variety of retail options and actively managing a regular communication channel between local government and the private sector to explore how public sector funding can attract retailers and result in decreased vacancy levels.

9.2. National Case Studies

National Case Study 1: English Market - Cork City, Co. Cork, Ireland

Significance of the Exemplar Study

The English Market is one of most iconic and oldest markets across Europe, located in Cork City, Co. Cork. The Market is a significant asset to Cork's economy as well as a key historic structure of the county. Outside of its strategic importance for employment and retail, the market is also known for its cultural importance, being a key tourist attraction in Cork. English Market has benefited from a variety of rejuvenation measures and upgrades in the market and its surroundings over a sustained period, which has transformed the area and increased the foot traffic because of its pedestrian-focused urban design and placemaking. Significant public realm improvements have been undertaken in the town centre by Cork City Council, informed by long term vision plans and strategies. Overall, the English Market is a great example of a vibrant and community focused market from which Galway City can draw an inspiration for the rejuvenation of its city centre.

Overview of the Strategy

The English Market in Cork has a unique retail strategy that has helped it thrive over the years. The market is built inside an architecturally significant building, making it not only a huge commercial asset for the city but also a heritage and tourism attraction. The market puts a strong emphasis on selling fresh and locally produced traditional Cork foods to give an indigenous touch to the products. It also offers a range of international delights. The stallholders in the market are local residents and independent food producers or retailers, often with generations of families working there. It plays a big role in boosting the local economy and fostering community spirit. Some of the stalls add a traditional touch by serving customers over the counter, providing a personal and unique service to visitors.

The diverse mix of traders also sets the market apart from others. It features a variety of small stalls to large businesses, fledgling traders, and long-established family businesses now run by the third or fourth generation. Not only the sellers but also the varied mix of products, such as poultry, organic fruits and vegetables, delicatessen, oils, chocolates, spices, condiments, cheese, bakery items, hot food, novelty items, crockery, art, and clothes, create a unique and inviting atmosphere. This also meets the varying needs of visitors of all age groups providing a wide customer base to the market.

Figure 55: Images of English Market stalls and a meat stall (Source: Cork City Council)

Cork City Council is responsible for any capital works within the English market, which includes the works contained in the refurbishment and upgrades of the market. The Council oversees all the operations and infrastructure improvements within the market. To provide opportunities to local small food entrepreneurs, Cork City Council, in collaboration with the English Market traders, has also run programs in the past, such as 'The Start Up Stall,' aiming to add start-up businesses retailing products or produce in the market that will complement, but not duplicate the English Market's current offerings.[27]

The Beamish and Crawford Quarter Public Realm Project 2021 also contributes to the increased footfall of the English Market, by creating a better sense of place and improving the pedestrian access to the market. The project includes improvements around South Main Street and Bishop Lucey Park that are located at a proximity to the English Market. The

[27] English Market - Cork City Council

proposed public realm improvements aim to redevelop the Grand Parade environment to create a pedestrian focused public realm along its main streets and create of conditions to support increased retail, catering and tourism offerings in South Main Street, Barrack Street and Proby's Quay and City Centre.

Key Learnings:

- Local and distinctive offerings: Placemaking initiatives highlighting local food and artisan suppliers create destination markets and enhance town centre identity.
- Civic management and curation: Oversight and periodic infrastructure upgrades enable long-term success and inclusivity.
- Integration with public realm: Pedestrian access and public realm enhancements boost footfall and dwell time within adjacent retail environments.

National Case Study 2: Navan, Co. Meath, Ireland

Significance of the Exemplar Study

Navan is the largest town and the administrative centre of County Meath. The town benefits from its strategic location due to its proximity to Boyne Valley and regional connectivity via M3 Motorway. Navan is a key heritage town that retains many of its historic features including its historic streetscapes. Similar to Galway City, the town has a diverse retail offering including a mix of modern retail parks, such as Navan Shopping Centre at Kennedy Road, and the traditional shopping experience comprising of a cluster of shops in the town centre core along the main street and other laneways. The shops in the town centre are primarily located along Trimgate Street, Market Square, Watergate Street, and Ludlow Street.

The Meath County Development Plan 2021-2027 states that Navan is the primary retail centre in Meath and is designated as a Level Two 'County Town' Centre in the retail hierarchy, however, there are certain areas identified for improvement in terms of environmental enhancement. The CDP also notes that the recent pattern of development in the town has consisted of residential development in the environs complemented by commercial development in the form of neighbourhood centres and retail parks.

Overview of the Strategy

The Public Realm Strategy for Navan – 'Navan 2030' sets out a range of centralised interventions to support and enhance its town centre to develop a more compelling retail and amenity reputation. The Plan adopted in 2016, brings together various policy objectives to deliver an integrated Public Realm and Movement Infrastructure Plan for Navan Town Centre. The Plan puts an emphasis on the importance of public realm in ensuring an attractive, accessible, inclusive, and safe environment that strengths the core identity of a town and makes visitors stay in the town centre for longer.

The Navan Town Centre has substantial heritage, a good range of retail and commercial services, and a wealth of established assets which are key for the functionality of the town and there is a considerable scope in the further enhancement in these areas. The Plan builds on the unique characteristics and assets of Navan aiming to achieve the abovementioned vision by aiming to enhance the physical attractiveness and movement and access in and out of the town centre through a suite of recommendations. Specific to retail, some of the recommendations include:

- Remove buses from Trimgate Street to create a high-quality streetscape with increased footfall supporting the retail premises.

- Re-route through traffic away from Trimagte Street to free up the potential of the street as the main pedestrian and retail street.

- Maximise the benefits of a bus stop in terms of generating footfall and explore retail and commercial opportunities arising to cater for travelling public.

- Wherever possible, adjoining retail and refreshment uses to be encouraged to extend out into the laneways with table/chairs or display of goods.

Figure 56: Existing (left) and proposed scenario (right) on Trimgate Street

Key Learnings:

- Prioritising pedestrian movement: Removing vehicle traffic from retail streets increases accessibility and supports business vibrancy.
- Public realm-driven regeneration: Coordinated streetscape, public realm, and transport improvements encourage retail, social engagement and community participation.
- Support the delivery of Sustainable Transport and Active Travel measures as set out in the Galway Transport Strategy: This will help provide continuous footfall and connect retail with local and regional markets.

9.3. Examples of Indigenous and Unique Irish Business Case Studies

The section outlines some successful examples of the indigenous local business case studies in Galway, which highlight the importance of community engagement, sustainable practices, and innovation in driving successful local businesses. These local enterprises play a key role in driving Galway's retail landscape, thereby contributing significantly to the city's economic growth.

Business Case Study 1: Cloon Keen, Galway

Based in Galway, Cloon Keen is a family-run business specialising in niche and luxury perfumery. This local business enhances the city's retail landscape by offering a unique blend of luxury and local craftmanship in their products.

Cloon Keen takes its name from the Gaelic term 'Cluain Caoin', meaning 'splendid meadow'. The products offered by Cloon Keen are handmade and locally produced. These range from candles, perfumes, body care, and accessories.

The raw materials required to make the perfumes are grown by the local farmers. The shop is located on the high street in Galway and is very popular amongst both residents and visitors.

The addition of more outlets promoting locally created products in Galway this would help elevate the overall shopping experience, contributing to the unique and distinctive retail environment of the city.

Business Case Study 2: BIA Innovator Campus, Athenry, Galway

The BIA Innovator Campus in Galway enhances the city's retail landscape by fostering food entrepreneurship and innovation. BIA Innovator Campus is the first infrastructure project in Ireland specialising in food sector incubation and innovation under one roof. Located in Athenry, Galway, the innovation campus supports local startups and scaling food businesses through technical and business support services.

The Athenry campus has three buildings spanning 2,301 square metres (24,768 sq. ft) of food specific resources to support food related businesses. The services in the Innovator Campus range from pay-per-use production units, long lease "own door" production units, business engagement zone, hot desking, food tourism demonstration auditorium, a buyer showcase room, culinary training unit, a dynamic offering of training, development, and acceleration programmes.

By providing a hub for food related enterprises, the campus attracts both startups and established companies, creating a dynamic ecosystem that boosts local retail activity. The campus also largely focuses on food tourism and cultural events drawing a large number of visitors to Galway.

The BIA Innovator Campus is divided into four subsectors which are:

- BIA Eolas – Eolas acts as a central hub for marketing, technical and business development skills related services to support the businesses.
- BIA Obair – Obair provides fully equipped pay per use production kitchens where start-ups and established small businesses can co-work and cut their operating costs. It also provides purpose built high specification starter units to assist businesses with their production requirement.
- BIA Blas – Blas is a culinary training centre with teaching facilities, and multiple workstations. The centre hosts career training programmes and masterclasses for events.
- BIA Luas – Luas is a co-working space comprising of hot desking spaces and meeting room rentals for business owners and entrepreneurs.

Business Case Study 3: Outset Gallery, Augustine Street, Galway

Outset Gallery, Galway showcases local and international artworks, providing opportunities to both emerging and experienced artists. The presence of the Gallery on Augustine Street attracts arts enthusiasts and tourists, thereby, boosting the foot traffic in the area.

By hosting exhibitions, workshops, and cultural events, it creates a vibrant and dynamic environment that complements nearby retail businesses, promoting a unique and engaging shopping experience for visitors in Galway.

The inclusion of more such places in Galway would help integrate arts and cultural spaces with retail spaces, thereby enhancing the overall character of the area. This would result in increased vitality and viability of the city centre.

Key Learnings:

- Local entrepreneurship: Niche, high-quality local businesses can shape a destination's retail character and attract tourism.
- Support infrastructure: Incubators and dedicated business spaces enable startups, local producers, and showcase innovation.
- Arts and cultural integration: Mixed-use retail/art spaces increase vibrancy and deliver spillover benefits for adjacent businesses.

9.4. International Case Studies

International Case Study 1: Bristol City Centre, Bristol, United Kingdom

Significance of the Exemplar Study

Bristol City Centre has been undergoing significant changes over the past decades due to shifting consumer patterns and expeditious development. The city centre is undergoing a major regeneration, prioritising mixed-use development and pedestrianisation in order to revitalise the area into a thriving retail and cultural neighbourhood. This transformation aims to attract residents and visitors to both live and work in the city centre.

The Bristol City Centre Delivery and Development Plan was unveiled in 2023, with a focus on how Bristol City Centre should evolve over the coming years. The City Centre is made up of Broadmead area, Castle Park, and Old City. The Plan notes that the Broadmead area within the city centre remain largely unchanged from the 1960s in places and is less representative of the character and feel of Bristol's distinctive identity, therefore, it was recommended that high streets need to evolve as people's needs change. The traditional and indigenous retail spaces in city were struggling to compete with the online shopping platforms and modern shopping outlets due to their increasing popularity. Similarly, in Galway City, the increased vacancy has been visible in the past few years due to various factors such as vacancy & dereliction, lack of activity outside peak hours, and shift to the online retail landscape particularly Covid-19 pandemic. The one key similarity between Bristol and Galway is despite their growth and appeal to tourists and students, vacancy rates in both the city centres remain high.

Overview of the Strategy

The Bristol City Centre Delivery and Development Plan 2023 aims to transform Bristol into a 24-hour city. The Plan aims to revitalise the Broadmead area of the city centre as a thriving retail hub. The plan emphasises on expanding and diversifying the retail value and offer as a destination for both residents and visitors. To achieve this aim, the plan sets out following objectives:

- Locating more community facilities (such as healthcare), indoor and outdoor community spaces and convenience retail (including fresh food shops) in the city centre which provide day to day reasons for residents to use the city centre and diversifying the land uses which encourage people to visit city centre for different reasons.

- Integrating culture into the visitor offer through supporting and making provision for cultural spaces, destinations, and events to contribute to vibrancy, participation, and activation.

- Supporting more independent and local businesses which contribute to the distinctive character of the city centre.

- Promoting a diverse mix of uses in the city centre by creating distinct thematic areas such as retail core, cultural corridor, food lane, microculture corridor, and independent lanes and courtyards.[28]

[28] City Centre Regeneration

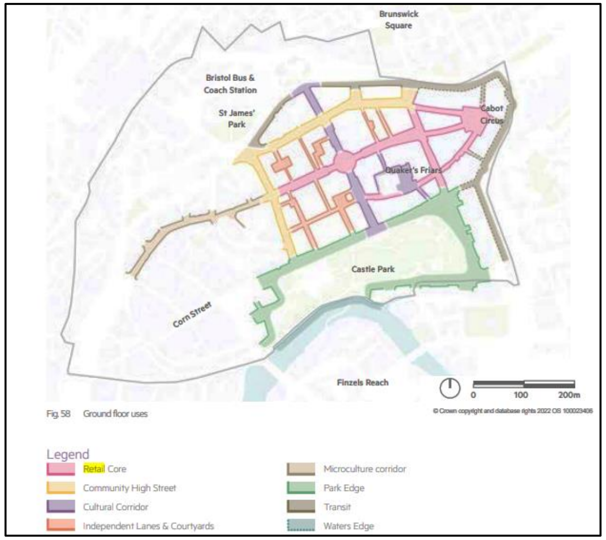


Figure 57. Thematic Map for Bristol City Centre (Source: Bristol City Centre Delivery and Development Plan 2023)

Key Learnings:

- Mixed-use diversification: Broadening the city-centre offer—healthcare, convenience foods, culture, independent shops—attracts a wider user base.
- Thematic clustering: Themed zones (retail, culture, food) reinforce city identity and support different activities and times of day.
- Repurposing assets: Flexible use of underutilised car parks and upper floors (e.g. pop-up shops, over-the-shop development, meanwhile use) helps reduce vacancy rates.

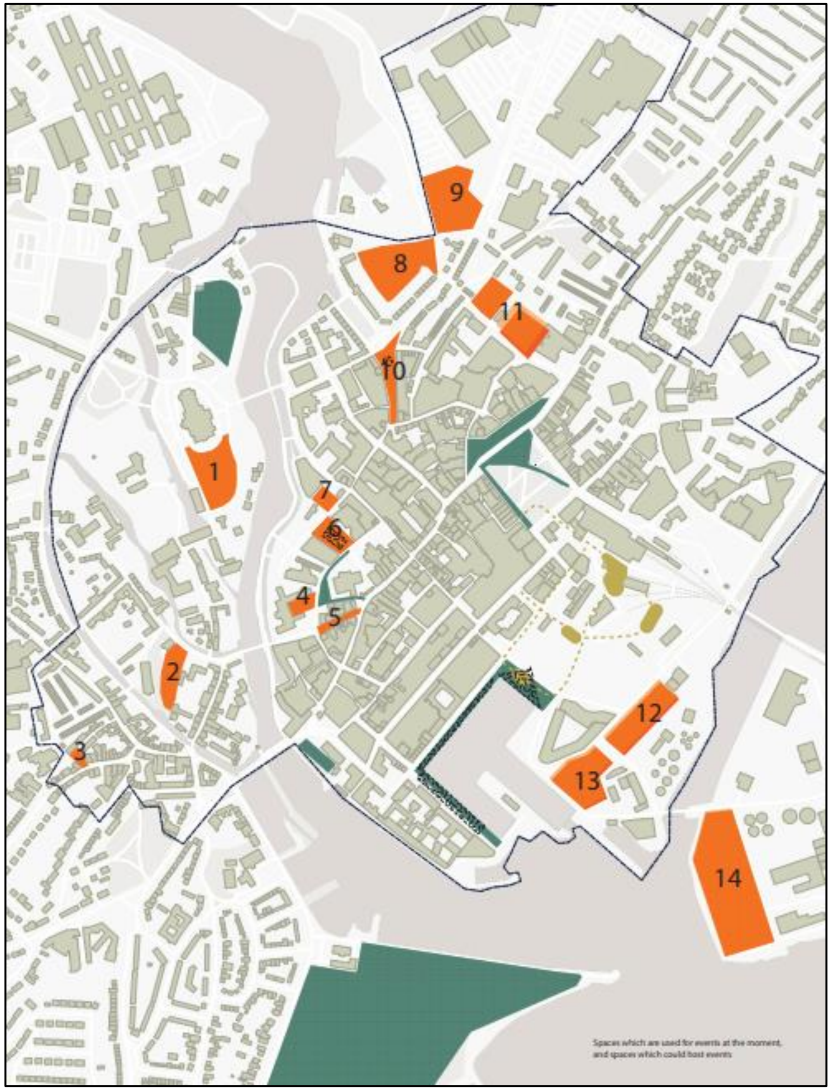


Figure 58. Existing car parking spaces used for events as opportunity sites Identified for future events/markets (Source: Galway Public Realm Strategy)

International Case Study 2:
Altrincham, Greater Manchester, United Kingdom

Significance of the Exemplar Study

Altrincham is a historic market town, established in the 20th century. Altrincham's main street faced high vacancy rates for years, but a concerted effort to improve the town centre led to a remarkable turnaround. The introduction of Altrincham Market, which is a well known award-winning destination with a range of independent speciality shops, pop-up shops, restaurants, and artisan products, played a significant role in attracting visitors and new businesses to the area. Altrincham was once known as 'Ghost Town' because of its high vacancy rates, however the transformative change that the town has undergone over the years, makes it a successful model for town centre revitalisation. Similarly, Galway city has its historical significance and is a key part of country's heritage. Additionally, Galway city centre has been facing a significant challenge with commercial vacancy rates due to multiple factors. In 2010, Altrincham has one of the highest vacancy rates (30%) in the UK.

Overview of the Strategy

Altrincham BID (Business Improvement District), also known as Altrincham Unlimited was established in 2016 for a five-year term, followed by a second term that began in 2021 after a successful ballot. Currently, surveys are being undertaken for the re-ballot of third term (2026-2031). The Altrincham Business Plan 2021-2026 emphasises creating a BID which will prioritise creating 'One Business Voice' for the town centre.[29]

The key aim of this BID has been to boost the footfall in the town through creating an environment to attract businesses and making residents and visitors want to spend longer time in the market. The BID works closely with its partners including Trafford Police, Trafford Council, Transport for Greater Manchester, and local businesses to manage the evening and night-time economies. The BID hosts targeted annual events and promotional seasonal campaigns to attract visitors to the town. These include walking tours, arts exhibitions, Christmas, Lantern Parade, Goose Green Festival, and Halloween festival events etc. Furthermore, the district also organises funding and training courses, and hosts networking events for upskilling the budding entrepreneurs and small business owners in the town. The BID is funded by a mandatory levy on all businesses based in Altrincham. The BID focuses on improving the public realm and accessibility of the town as well. This includes regular programmes for deep cleaning, regular litter picking, support for planting schemes, maintaining floral displays, tree lighting, and PR activities to raise a demand for units in Altrincham targeted towards reducing vacancy.

In order to create a strong voice for the business community and creating strong links with the organisations which can affect the business environment in Altrincham, the BID has established groups, forums, and meeting which include Town centre management, Town centre Retail Security, Altrincham Together Business Task Force, Retail Forum, and Mayor of Greater Manchester Networking.

Figure 59. Images of Altrincham Market (Source: I love Manchester)

Key Learnings:

- Business improvement structures: Town centre BIDs enable collaborative marketing, public realm improvement and event programming.
- Stakeholder voice: Forums and retailer working groups facilitate business input into strategy and implementation.

[29] 2021-2026-business-plan.pdf

- Event-driven activation: Seasonal events and targeted place-branding campaigns boost footfall and reduce commercial vacancy.

International Case Study 3: De Hallen, Amsterdam, The Netherlands

Significance of the Exemplar Study

De Hallen is a national monument and former derelict tram depot located just behind the Kinkerstraat and adjacent to the Ten Katemarkt. De Hallen was used as a tram depot for years and in 2014, it was repurposed as a cultural complex which is a one stop shop for food and beverage, shopping, arts and crafts, and activities. The key retail elements of De Hallen include anchor tenants and speciality shops. De Hallen is a key example of urban transformation of an abandoned space or building. It serves as a prime inspiration for the transformation of underutilised and derelict builds that are being disposed by the local authorities, corporations, or governments. The project fosters the importance of involving the stakeholders in the planning process of a development to ensure that their needs are being met. The project teaches us lessons around the underlying value of preserving the heritage in a modern development which can set it apart from others.

Overview of the Strategy

During the twentieth century the De Hallen was used for war purposes (regular tram services ceased) and then it remained vacant for years. In 2013, Tram Remise Development Company (TROM) developed a renovation plan for the depot while retaining the features of its original function. One of the key design features of the space is that the Tram rails still run through the central passage and the original stone number plates on the walls refer to the halls located behind it.[30] The construction of De Hallen took place in a sequential manner, and it was delivered within a period of 14-21 months. During the redevelopment, to save the costs of construction of roofs, it was ensured that no daylight can enter the location of studios and theatres in the monumental block. De Hallen also has a Warmth-Cold Storage (in Dutch: *Warmte-Koude Opslag*) WKO system, which was supposed to heat the new houses at the Bilderdijkkade. Hence, it scores very high in sustainability.

The redevelopment of De Hallen boosted the local economy and has been supporting multiple retailers, creators, and entrepreneurs since 2015. The building has become a focal point of social and cultural gatherings, attracting a lot of foot traffic into the area.

Figure 60. Before (left) and after (right) photographs of De Hallen (Source: Amsterdam Hoax)

Key Learnings:

- Adaptive reuse: Conversion of heritage and vacant infrastructure supports new mixed-uses and cultural/retail destination value.
- Sustainable retrofit: Sustainability principles (e.g. efficient energy systems, conservation) underpin the transformation of older spaces.
- Inclusive stakeholder planning: Extensive stakeholder engagement ensures new uses respond to community and business needs.

[30] Then and Now — De Hallen Amsterdam

International Case Study 4: San Francisco, California, United States

Significance of the Exemplar Study

San Francisco's "Vacant to Vibrant" initiative is a mayoral public-private partnership aimed at revitalising the downtown area. This scheme, in collaboration with shop owners and entrepreneurs, seeks to transform vacant spaces into gathering areas and pop-up experiences. By supporting small businesses, artists, budding entrepreneurs, and cultural organisations, and working with local property owners, the initiative aims to bring back the vitality and viability of the city centre.

Following the COVID-19 pandemic, there was a significant increase in the number of vacant commercial properties in downtown San Francisco, leading to a decrease in foot traffic. Currently, Galway City Centre is facing a similar challenge, with traditional brick-and-mortar shops closing down and resulting in a high vacancy rate.

Given the parallels between the situations in both cities, the insights from San Francisco's case study could provide valuable takeaways for Galway, helping to address its own post-pandemic challenges.

Overview of the Strategy

This scheme was launched by a local nonprofit SF New Deal and City of San Francisco’s Office of Economic and Workforce Development (OEWD), and co-funded by some private companies including Wells Fargo. Each cohort of the scheme will activate 10-15 ground floor vacancies in a 1-3 block stretch to engage the community and inspire activity downtown.[31] Out of a large pool of applicants, the successful applicants who made it to the first cohort, received a grant between $3,000-$8,000 to set up their businesses. Of the original nine properties involved in the inaugural cohort of the program that launched in the fall of 2023, seven small business owners have signed long-term leases downtown and will receive additional grant funding and technical assistance from SF New Deal.[32]

The key business across both the cohorts includes a mix of arts and culture focused outlets, food and beverage outlets, and retail and workshops. Some of the key experiences across both the cohorts include 7x7 Social Club, Public Glass, Devils’ Teeth Bakery, Whack Donuts!, Koolfi Kreamery, and Paper Son Café.

Figure 61: Timeline of the Vacant to Vibrant Cohort (Source: Vacant to Vibrant)

After the huge success of the cohort one program launched in 2023, the second cohort of Vacant to Vibrant was announced in 2024.

Key Learnings:

- Pilot activation projects: Temporary occupation of vacant units by entrepreneurs or artists can catalyse activity and attract long-term tenants.
- Grant support and flexible policy: Small-scale grants, “pop-up” licensing, and technical guidance lower barriers for local enterprise and arts.
- Vacancy mapping and community feedback: Systematic mapping and resident input guide vacant property prioritisation, strengthening alignment with local aspirations.

[31] SF.GOV

[32] https://sfnewdeal.org/blog/vacant-to-vibrant-cohort-2-wells-1-million